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ABSTRACT

This publication contains nine articles about the process of doing research by literacy practitioners and volunteers in several areas of the Ontario (Canada) literacy field. "Implementing a Workplace Program: A Look Back" (Maria Ioannou-Makrakis) describes the process followed and the learning outcomes from planning, implementing, and developing a workplace literacy program in a rural community. "The Open Learning Network" (Frances Lever) focuses on researching and developing a cross-sectoral accreditation system with planned involvement of experts, students, providers, and information users. "Course Charting" (Deborah LeForestier) is a description of the participatory assessment process as practiced in an adult skills upgrading project. "How Are New Learners Socialized into an Existing Literacy Program?" (Michael G. Wodlinger, Regina Muetze) examines the process that would best facilitate a literacy learner's entry into a new program. "Group Process in Literacy: Program-Based Research" (Heather Lennie Segsworth) looks at the development of groups in literacy classes. "The ESL [English as a Second Language] and Literacy Bridging Project" (Judy Bernstein, Lori Rothschild) describes a curriculum development project that was allowed to evolve towards an initially undefined outcome. "Trial, Error, and Back to the Drawing Board" (Suzy Harris) tells how testing methods and instruments before starting on a full-scale evaluation saved time and made the information more interesting and useful. "Evaluation and Change in a Literacy Program" (Patrick Cummins) is a case study that explores some factors leading to evaluation use. "Dialogue: Questions of a Novice Researcher" (Suzy Harris, Michael Wodlinger) is an edited dialogue dealing with some issues around program evaluation. Also included is a review of a research report, "Literacy in South Muskoka." (YLB)

SEEK GATHER AND REPORT

EXPERIENCES IN PROGRAM-BASED LITERACY RESEARCH

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SEEK GATHER AND REPORT

EXPERIENCES IN PROGRAM-BASED LITERACY RESEARCH

A PUBLICATION OF THE
PROGRAM-BASED RESEARCH SPECIAL INTEREST GROUP

Seek, Gather and Report: Occasional Papers of the Program-Based Research Special Interest Group (PBRSIG)

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INTRODUCTION

This "august publication" has a very simple aim: to illustrate to all literacy practitioners that research need not be esoteric and fit only for academics. Research is asking questions. Because the adult literacy field is young and growing there are many questions to ask. And because the field has now been working for a few years there are many areas to evaluate in an effort to recognize the good, identify the gaps and improve the whole.

Many people are intimidated by the term "research". Yet many of you are probably doing research right now. Some of the kinds of questioning going on are:

- case studies of individual student/tutor matches
- patterns of literacy and numeracy needs in a community
- introduction of a new curriculum or assessment scheme
- notice of a change in learner journals written over a period of time.

We are bringing to you, in this journal, articles by literacy practitioners who have been connected with a research project. The journal is not publishing the reports which were the outcomes of the various projects but, rather, articles about the process of doing the research. There were different types of questions asked and different methods used to arrive at answers. The results are needed for various uses from evaluations to give funders, to materials to fill the needs of the unemployed, to observations made about behaviour and socialization, to how to help immigrant workers in a workplace with four distinct cultures.

These articles come from literacy practitioners and volunteers in several areas of the Ontario literacy field. Most, but not all, were funded. Some had special staff for the research project, some practitioners added the research to their other duties. You will find projects from within the College system, in School Board programs, one through a regional network encompassing all programs, another in a rural community for a community-based program and still another in a Labour Adjustment Initiative program.

The authors of these articles have added this piece of writing to already overworked schedules to help their fellows in Ontario's literacy community see the value (and some of the joys and woes) of doing research. The articles may also show where some questioning is being done allowing a sharing of findings. Let's avoid the reinvention of the wheel wherever possible.

The Program-Based Research Special Interest Group (PBRSIG) has been in operation for five years. During 1992, the steering committee published a manual available to all programs through the Ministry of Education and Training, Literacy Branch. **Seek, Gather and Process: a research manual for literacy programs** can be used as a hands-on manual or can be incorporated into a workshop format. The manual provides some theory but also gives practical examples and exercises.

Seek, Gather and Process and this publication are actively stressing the process of research. There is not one highway to answers but many. The aim of these publications is to show some of the ways, give some help in how the paths can be followed, show up some of the problems that arise and possible solutions to those problems. There are as many ways of answering questions as there are questions.

In the literacy field the aim of practitioners, both staff and volunteer, is to help individuals in the way most useful to them. This is the aim of the PBRSIG, also. We hope that, among all of these articles, there will be ideas which will be useful to you.

IMPLEMENTING A WORKPLACE PROGRAM: A LOOK BACK

Maria Ioannou-Makrakis

This paper describes the process followed and the learning outcomes from planning, implementing and developing a workplace literacy program in a rural community. The project involved developing assessment and learning material and researching appropriate methods of program delivery.

The results of the research were positive and useful to employees and management of the workplace and to ourselves, the adult educators of the Carleton Roman Catholic School Board. For the workplace, the results were "change agents" to creating a united learning community of empowered workers. For the School Board, these results are functioning as a guide in developing further programs.

The research was conducted at a mushroom farm by the workplace instructor, Martha MacDougall, and myself, the project coordinator, through cooperation and support from employees and management at the farm.

I. GETTING STARTED

This was my first attempt at workplace programming; therefore many questions were already circulating in my mind:

What does a workplace program look like?
What does it involve?
Who is involved?

What does it need?
How does it start?
How is it designed?
How is it evaluated?

I also had my own assumptions about what this project "should look like" and was anxious to implement them. I quickly realized that what I thought it should be was different from what it could be. This realization came as a result of a lengthy, informative tour of the workplace, led by an employee. The project could not be planned and delivered in a neat little package. I had to respect the uniqueness of the workplace – environment, duties, schedule, needs and people. Therefore, I decided to relax and observe, take part, ask and learn about this community.

> ***"The project could not be planned and delivered in a neat little package. I had to respect the uniqueness of the workplace – environment, duties, schedule, needs and people."***

I recognized that my research objectives would be to (a) explore and document innovative ways to reduce training barriers in the workplace and (b) to research and develop a model for workplace programs. With this in mind, I was on my way!

II. IDENTIFYING NEEDS

There were three parts to identifying our needs: an organizational needs assessment, a literacy task analysis and an advisory committee.

Organizational Needs Assessment

Martha and I conducted an organizational needs assessment (Reference 1) through the following procedures:

- participation in the day-to-day activities;
- research and observation of all aspects of the farm such as procedures, reading materials, job tasks, safety manuals;

- collective and individual meetings with supervisors regarding their needs and employees' needs; and
- informal and individualized meetings with employees on site.

Unlike my initial assumptions, the needs assessment was flexible and informal in order to provide a non-threatening atmosphere and respect the value of time for employees and management. To accommodate this, the needs assessment was conducted during the daily working activities, at times when both Martha and worker were picking mushrooms.

Recorded observations provided direction in the implementation of programming. These observations also raised questions as to possible barriers in implementing the program as my notes reveal.

From my notes:

How do I plan a workplace program that evolves around the following:
...harvesters are paid by piece work. Every minute away from picking means money.
...the previous night's growth of mushrooms determines the length of the working day; therefore will also determine the time employees will have for class work.

Since time means money, are there alternative vehicles to provide a program out of the working schedule?

What strategy do I use to create better communication and cultural understanding for everyone at all levels?

Literacy Task Analysis

Since the majority of the workforce consisted of mushroom pickers, I wanted to have a clear understanding of what the jobs involved. Martha and I conducted a literacy task analysis for two positions - mushroom pickers and supervisors. This was very useful in program and material development. Martha and I interviewed supervisors and pickers and followed them in their daily duties. In addition, I participated in the orientation and training session which the supervisors conduct for all new mushroom pickers.

The results of this task analysis led to the development of tailor-made learning materials, including a plain language training package for new employees.

"One of my goals from the very beginning was to have a widely representative advisory committee which would meet regularly to give input and direction to the project."

Advisory Committee

One of my goals from the very beginning was to have a widely representative advisory committee which would meet regularly to give input and direction to the project. Due to time constraints, unusual schedules, remoteness of workplace and lack of familiarity with the project, no one volunteered initially.

The Organizational Needs Assessment, the Literacy Task Analysis and flexibility on our part helped us get a group of employees to be our advisors. Flexibility was important as we had to meet people at their convenience which often was at their work. The advisory committee included: manager, employee/learner, supervisor, safety committee representative, instructor and coordinator (myself).

III. DESIGNING/IMPLEMENTING PROGRAM

The organizational needs assessment identified a group of 15 employees who wanted to either improve their English or upgrade their skills and were willing to attend a program twice a week. A room in the mushroom farm was allocated to be "The Learning Center". The employees had a variety of needs and were at various levels. Martha and I grouped students using our own curriculum-planning sheets which listed needs and/or interests: Reading, Writing, Math, ESL, Computer, Communication, Other. Once students were grouped, Martha met with each student and negotiated individual learning plans.

What followed was a "trial and error" approach to various forms of program delivery. A need would be identified and I would search for a way to respond to the need. I would get input from the people involved and our advisory committee. If something did not work, I would find a way to change it. If we collectively ran out of ways to change or improve it, we would put it on hold, until we could think of a solution. The following are examples of some methods of delivery.

(i) Drop In

Employees were encouraged to drop in to the Learning Center with questions about their education, the workplace program, the workplace materials they needed to read, e.g. mail, application forms, signs, etc. They also came to learn about the computer and to type stories and letters. The information acquired at the "Drop-In" sessions also served as a guide in planning future programs.

(ii) Courses During Lunch

Through conversations at the Drop-In, Martha discovered that many employees wanted to study for their Citizenship, or complete the census forms but could not sacrifice their work time in order to drop in to the Learning Center. The consensus was to schedule these courses over lunch.

(iii) The Bus News Program

The more I talked to people, documented and observed, the more evident it became that there was a need for more communication and a means to promote learning opportunities to those who were not able to attend all programs. How could we do this? People could neither come earlier to work nor stay later since they were bused to and from the farm. Some would be on the bus for one to one and a half hours. The answer: a weekly newsletter which everyone could read on the bus. The ones who could not read it, could do so with the help of a friend. This sparked the idea of having actual classes on the bus which I later explored. (But that's another piece of research!)

IV. FEEDBACK

As mentioned in the previous section, input and participation from everyone developed the program. Each individual was an "expert" and had something to contribute. These contributions were not encouraged only through meetings and conversations on a daily basis but formal research tools were also used. Program participants and Advisory Committee members were interviewed and taped (with permission). They were also asked to complete a questionnaire on their experience in the program and to give us recommendations for future efforts. Everyone at the farm was encouraged to complete a questionnaire in the newsletter. Martha maintained learning portfolios for some workplace learners which followed the students' progress from beginning to end.

At the end of the project I reviewed all the collected data (mentioned in the previous paragraph), my notes, Martha's notes, the organizational needs assessment, literacy task analysis results and the original objectives. Through reflection and reference to everything I had collected, Martha and I identified the ways in which we felt we had met each objective. The following are two examples of how we did it.

Objective: To research and develop a program model

1. Conducted a needs assessment to identify the needs of the particular workplace.
2. Developed a program model based on building a community within the workplace.
3. Developed a collection of learning materials designed to meet the workplace needs of employees and supervisors in a mushroom farm.
4. Attempted innovative strategies to overcome barriers in delivery, e.g. newsletter.
5. Provided and developed expertise in workplace programming.

Objective: To explore and document innovative ways to reduce training barriers in the workplace.

1. Attempted a variety of methods of delivery, e.g. lunch hour courses, drop-ins, newsletter etc.
2. Provided a program through a weekly newsletter which gave all employees an opportunity to participate and learn.
3. Delivered flexible programming in order to adapt to the picking schedule.
4. Communicated with employees in clear language.

5. Supplied materials to employees who wanted to study independently.
6. Scheduled short lunch hour courses for employees who did not wish to take time off of work.
7. United the workplace community through the use of a newsletter.
8. Accommodated the company's and employees' schedules.

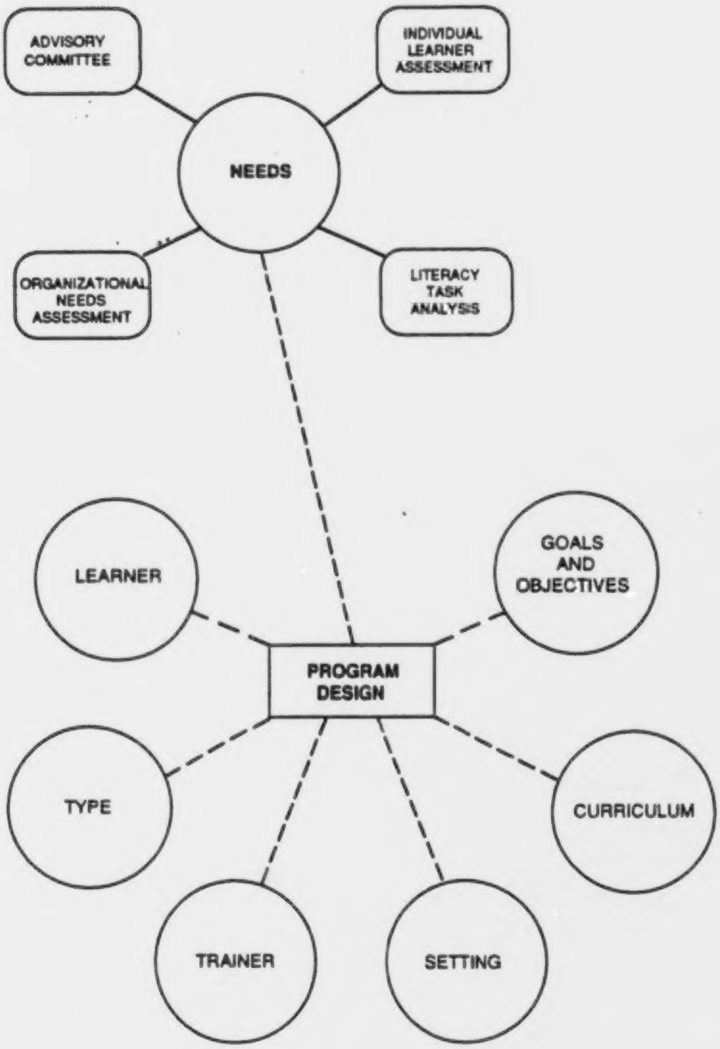
(Ioannou-Makrakis, Maria, 1990)

It was a very rewarding feeling to see that I had been successful in meeting my research objectives but most importantly that we had learned a great deal about workplace programming. My initial questions were answered.

"A program is determined through a good understanding of the organization's needs, the employee's duties and the learner's individual needs."

LEARNING

The diagram which follows represents my thoughts about the interrelationships of different factors that affect a workplace program. A program is determined through a good understanding of the organization's needs, the employee's duties and the learner's individual needs. The advisory committee provides expertise and guidance to ensure the needs are successfully met. The advisory committee and the identified needs determine the goals, objectives and types of program delivery. Successful programming is determined by the learner, trainer and curriculum within the particular setting or environment. When designing future workplace programs I will refer to this guide to assist me in developing a program, considering always the uniqueness of each workplace.


ADVISORY COMMITTEE
INDIVIDUAL LEARNER ASSESSMENT
NEEDS
ORGANIZATIONAL NEEDS ASSESSMENT
LITERACY TASK ANALYSIS
LEARNER
GOALS AND OBJECTIVES
PROGRAM DESIGN
TYPE
CURRICULUM
TRAINER
SETTING

WORKPLACE LITERACY - PROGRAM DESIGN

ACKNOWLEDGEMENTS

The project was made possible through a 1990 Workplace Incentives Grant, sponsored by the National Literacy Secretariat and the Literacy Branch of the Ministry of Education. We are grateful to Sue Folinsbee for her ongoing consultations and Ed Godden for his support of the pilot and flexibility in allowing the research to happen.

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ABOUT THE AUTHOR

Maria Ioannou-Makrakis has been an E.S.L. and A.B.E. instructor in school, community and special needs programs. She has worked on learner assessment, material development and teacher training. She has coordinated and researched innovative projects to address the needs of rural/urban communities, the workplace and the family. She is currently Administrator of Continuing Education with the Carleton Roman Catholic School Board.

THE OPEN LEARNING NETWORK

Frances Lever
Literacy Link Eastern Ontario

> *For a long time now, literacy workers, learners and volunteers in the eastern Ontario region have been asking these questions:*
>
> ***How can we document the learning that takes place in literacy programs?***
> *and*
> ***How can the adult learner receive credit for that learning?***
>
> *The Board of Directors of Literacy Link Eastern Ontario, a regional network, applied for funding to the Ministry of Education Literacy Branch, and The National Literacy Secretariat so that we could initiate a regional system of documenting and recognizing the learning that takes place in our programs. Work started on the Open Learning Network (OLN) project in 1991 and is still ongoing.*

CREATING AN ACCREDITATION SYSTEM

Literacy workers in eastern Ontario find that the literacy field is still developing and there is a lack of appropriate placement and assessment materials and tools for the adult literacy learner in their programs. This project provides practitioners with the opportunity to meet and consult with other educators in the field in order to develop consistent, comprehensive methods and approaches. Learners frustrated with the lack of recognition for their learning from institution to institution will benefit most from an accreditation system. They can be provided with proof of learning that is acceptable to all educators across the different educational sectors, as well as employers. The work is very timely as both school boards and colleges are articulating what they teach, and this project reports to these groups on a regular basis.

The project was divided into three phases so that we could track and measure our progress.

Phase One

A researcher and a consultant with experience in the literacy field were hired. The director of the Network, the researcher and the consultant formed the initial working group. Phase One focused on gathering articulation models and materials from Canada and the U.K. We spent a great deal of time discussing the questions with the literacy field, business community and other educational institutions.

We identified the conclusions from Phase One by selecting and grouping key points from the written interviews we conducted. From the data we were able to determine that we should:

- concentrate on finding out and documenting the learning that takes place in literacy programs

- collaborate with literacy programs to develop an accreditation model

- ensure that 'standards' of accreditation are acceptable and understandable to the wider community

A report was written and issued. Copies were distributed to the funders and to all who took part in the interview process, and to other interested parties.

Phase Two

We started Phase Two of the project in August 1992. All organizations and institutions in the region were contacted to participate in an information session and to form a working group.

The project was named The Open Learning Network (OLN). Throughout the fall and winter, the working group met once a month for one or two days. The consultation process was participatory, across all roles, (learners, teachers, administrators) and all sectors, (community- based, school board, and college).

We invited the working group to submit skills inventories for the study of communications, numeracy, personal management and computers that they use in their programs. Local groups were formed to collaborate on the development of one list for each area of study that would be flexible enough to satisfy the needs of all programs. The working group met to review the work of the local groups. The skills lists, resulting from the small group work, were blended into one master list for Communications, Numeracy, Personal Management and Computers.

A person knowledgeable in curriculum design was hired to further develop the skills inventories. Together with the working group, she looked at many curriculums for communications, numeracy, personal management and computers and expanded the skills inventories that had been compiled. A draft mission statement and a possible model of accreditation was also developed in meetings over a period of 3 months. In order to develop a model, the working committee identified essential ingrediehts that would make a successful process:

> *The system must be flexible, learner-friendly, voluntary, academically sound, easily accessible to all adults at all stages of learning, transferable, credible to educators and employers alike, and take into account linguistic and ethnic diversity.*

The following objectives for an accreditation model were developed by brainstorming ideas and recording on flipcharts:

- provide a framework for learning strategies and content used by practitioners across eastern Ontario
- develop the use of prior learning assessment as a placement tool for practitioners
- give recognition to learning across a variety of sectors
- facilitate meetings of literacy providers where they can share ideas
- allow students easier access to all programs
- support staff in developing curriculum and an understanding of consistent assessment procedures

"We found that reaching consensus on a model needed a great deal of discussion and collaboration."

We found that reaching consensus on a model needed a great deal of discussion and collaboration. During discussion on control of the accreditation system, questions arose such as:

- should the institutions be responsible for accreditation, or an impartial body such as the literacy network?
- how will we ensure quality control, if the institutions give out the accreditation?
- should there be a panel of peers to monitor the process?
- how can we design the process to ensure maximum ease for our learners?
- how can we monitor the process without disempowering our literacy teachers?

We felt that these problem areas will probably be resolved by implementing pilots of the accreditation system in order to see which system will be the most effective.

Learner input into the proposed model was sought out and recorded. There is a concern among learners and practitioners alike, that this system must not test for deficiencies, but rather be used to document the accomplishments of learners. Access is another concern. The OLN must accommodate individual differences and provide opportunities for linguistic and cultural differences.

The working group discussed the process with their learners while the Network staff developed and held Learner Feedback information sessions. A great deal of useful opinions and information was received from learners and utilized in the draft model.

"There is a concern among learners and practitioners alike, that this system must not test for deficiencies, but rather be used to document the accomplishments of learners."

INDICATORS OF SUCCESS

Throughout Phase Two we evaluated our success by the degree of the following indicators:

organizational commitment

- institutions and organizations released their staff on paid time for one or two days a month to work on the project

individual commitment

- attendance was high because interest was high

participant openness

- participants submitted their work without hesitation for scrutiny by the group process
- discussions were open and constructive
- consensus was reached on major issues

The working group has general agreement on the following items:

- the OLN needs a central registry where guidelines can be constantly reviewed and updated, and where learning records can be issued to learners

- an OLN panel structure to assess the learning would provide reliability for the model, and would also provide teacher support

- the OLN should provide professional development and resources for teachers who are part of the system

"Learners who have been marginalized in the education system in the past, now feel that they are gaining some control over their learning. They ...will use the accreditation to improve their employability and for their own satisfaction."

Many positive issues emerged in the working group throughout Phase Two. Communication across the educational sectors increased. The group gradually took ownership of the project and have become empowered by recognizing their expertise and creativity in developing an accreditation system for their learners. Learners who have been marginalized in the education system in the past, now feel that they are gaining some control over their learning. They have responded in interviews by saying that they will use the accreditation to improve their employability and for their own satisfaction.

RESULTS OF THE ANALYSIS

Phase Three of the project started in September 1993. Pilots of the Accreditation System were implemented based on the following principles:

- programs and learners join the OLN

- training and orientation is provided to literacy workers and tutors

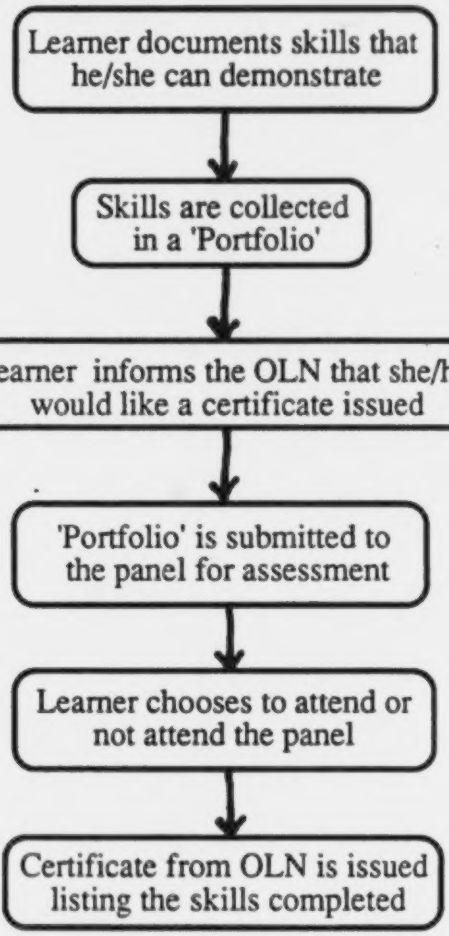
- learner and his/her tutor receive orientation to OLN

- learner is assessed and placed on a skills path

- skill paths are a guide for the learner and tutor

- an assessment panel is formed consisting of an OLN staff person who monitors all panels, the learner (optional - see flowchart), the learner's tutor, and a literacy worker from another program

The learner's pathway to accreditation is outlined in the following flowchart:


Learner documents skills that he/she can demonstrate
Skills are collected in a 'Portfolio'
Learner informs the OLN that she/he would like a certificate issued
'Portfolio' is submitted to the panel for assessment
Learner chooses to attend or not attend the panel
Certificate from OLN is issued listing the skills completed

After careful analysis of the feedback from the pilots, we hope a revised Open Learning Network will be established by April 1,1994.

Even though the research project has not yet ended, teachers and learners are already looking forward to the potential benefits of this accreditation system. The Open Learning Network's main function will be to validate the learning that takes place at the level of basic skills. We anticipate that it will have a major impact on the education system as it affects adult learners in eastern Ontario.

ABOUT THE AUTHOR

Frances Lever joined the literacy field in 1988 when the Network was first established in the eastern Ontario region. Frances has worked on a variety of literacy projects and is currently the interim executive director of Literacy Link Eastern Ontario.

COURSE CHARTING

Deborah LeForestier

This article is a description of the participatory assessment process as practised in an adult skills upgrading project in Collingwood, Ontario. The author, who is the assessor in this project has coined the term "course charting" to describe the ongoing assessment process as practised in this project.

INTRODUCTION:

This paper originates with a group called the Georgian Triangle Literacy and Basic Skills Coalition, based in Collingwood, Ontario. The Coalition places adults in skills upgrading programs which are run by a variety of educational providers.

This project started as part of the Labour Adjustment Initiative (LAI) for displaced workers, funded by the Literacy Branch of the Ontario Ministry of Education and Training. The LAI project encouraged an "Individual Retraining Process" or I.R.P.[1] Among other things, course charting provides an effective means of managing this process.

The manual Seek Gather and Process provided useful guidelines in the preparation of this material.

Here in Collingwood, we have developed a program of adult skills upgrading which allows them to "take the shortest route" to their learning destination. From the moment of their entry into the program, and at each

[1] Craig, Charles: LAI - The Individualized Retraining Process, Toronto: Literacy Branch, Ministry of Education, 1991.

step along the way, the adult learners are accorded full respect and are provided with all the information they need to take autonomous control of their course. We call this process "course charting".

We have gathered and kept data on all participants in the project since its start a little over two years ago. Preliminary analysis of our data suggests that course charting results in a low drop-out rate from our programs, and a high degree of satisfaction for both the learners and the instructors. A high proportion of learners achieve their personal goals.

"Preliminary analysis of our data suggests that course charting results in a low drop-out rate from our programs, and a high degree of satisfaction for both the learners and the instructors. A high proportion of learners achieve their personal goals."

Course charting enables these learners to take the shortest routes to these goals.

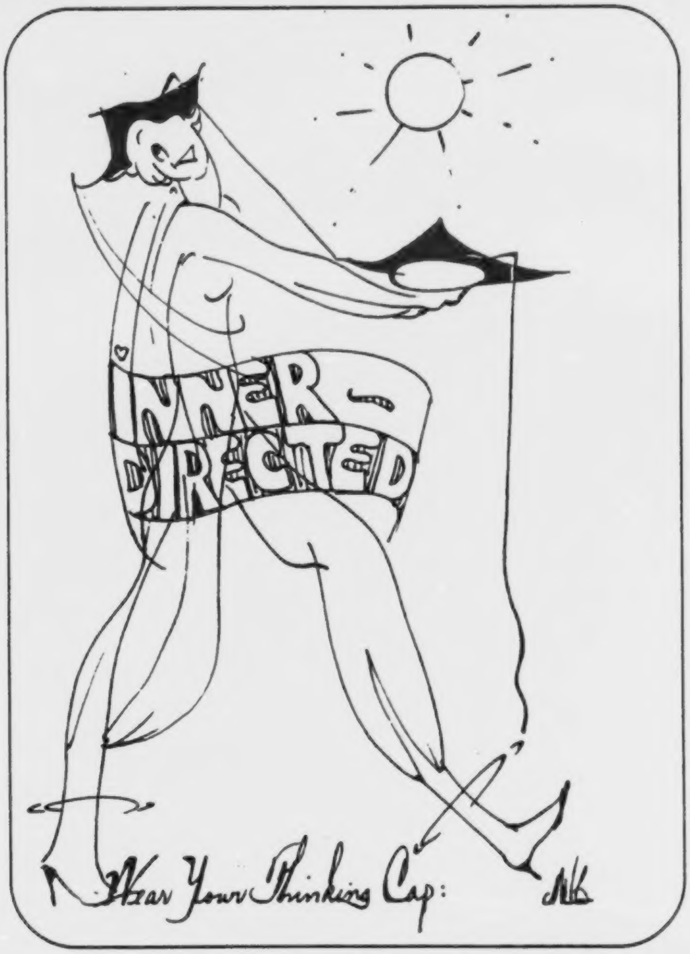
This paper limits itself to a description of the course charting process. Later we hope to publish the data we have gathered on some three hundred adult learners who have gone through the process.

THE ASSESSMENT PROCESS

From the beginning we wanted our learners to know that they were beginning a process over which they had control. Course charting begins with a radical departure from other assessment methods: we help the learners to identify their own needs.

In a one-on-one setting, the assessor sits beside the learner. (The Latin root of assess is assidere, to sit beside.) Then a conversation takes place, during which the learner may take the lead. The assessor nevertheless elicits the perspective, goals, and attitudes of the learner. Based on the learner's goals, the assessor can determine what skills the learner will need. Next it is necessary to determine the learner's present skill level. This is done as the interview continues. The emphasis at all times is on what the learner can do, as suitable, respectful opportunities are

EXPERIENCE


INNER-
DIRECTED
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IS THE BEST TEACHER

provided for the learner to demonstrate skills already mastered. These demonstrations, along with specific questions, are intermingled with discussion, encouraging the learner to demonstrate specific skills in reading, writing, numeracy, listening, thinking, and learning style.

At this point, the assessment is concluded. We know what the person wants to attain, and we know what they have already attained. The difference makes up the course. This is the first stage in the ongoing process of course charting.

The reader will notice that we have not asked the learner to complete any standardized tests. We have given no grade levels, no test scores of any kind. We have focused only on the specific skills that each learner needs to attain their personal goals.

"We will provide the learner with a checklist of skills. This list is their own property. They can use it to ensure that they are getting the skills they need."

We will provide the learner with a checklist of skills. This list is their own property. They can use it to ensure that they are getting the skills they need. (See Appendix I).

ON LEARNING STYLES

Because we wish to emphasize the positive with our learners, we avoid the term learning disabilities. Instead, we speak of learning style. A brief example here will help us to explain. Some learners with weak auditory memory may have strong visual memory, so we would emphasize the use of visual cues in teaching them. We would insure that these learners were aware that they were visual learners and discuss the ramifications of this with both the learners and their instructors. Contrast this approach with the effect of hearing the news "you have a learning disability - a weak auditory memory".

ASSESSMENT TOOLS

We have developed many non-threatening, adult-respectful assessment tools. These tools, like the interview, are designed to help determine what the learner can do.

Based on factory tours, we were able to create word recognition lists specific to the populations of displaced workers we were seeing. These lists, which we call "Work Recognition Lists", (owing to a typing error, and the name stuck!) enable a former shipyard worker, for example, to read words from the shipyard list. We just ask them to read the words they can. We developed our math inventory based on standardized test items and textbook questions, so that we could assess skills required for real courses.

"...we were able to create word recognition lists specific to the populations of displaced workers we were seeing. These lists, which we call "Work Recognition Lists", ... enable a former shipyard worker, for example, to read words from the shipyard list."

They allow us to check off what a person does know. We interviewed the most successful instructors to obtain our lists of skills required for entry into their courses.(See Appendix II) Our learning style inventories help us to explain to the learners (and later to their instructors) what is the best way for them to learn. These tools are now being used by other projects. They are not standardized tests, nor are they meant to be. They are tools helpful in course charting.

COLLABORATIVE TRAINING (See Appendix III)

At the end of the assessment, our learners have expressed their goals and know both what they know and what they need to know. They have helped to identify their own needs, and are in position to take charge of, and to feel comfortable in, the program they are about to enter.

These programs are individualized, based on the results of the assessment. The learners can "fast track" themselves through just the course elements they need, using the skills they already have, and the checklist we gave them. For example, a former shipyard worker who wishes to access the auto mechanics apprenticeship program, but who never took Grade 10 math (a minimum requirement of the auto mechanics program), may have demonstrated competence in all the content of Grade 10 math except precise measurement. This worker would only need the precise measurement skill in order to be prepared for the apprenticeship program. This worker's course will be in precise measurement, preparatory to the apprenticeship program, and the instructors will be made aware of the learner's style.

FOLLOW-UP PROCEDURE

Once the learners have begun their training program, our follow-up procedure begins. Our LAI model incorporates a neutral party, the assessor, but elements of our process will work in other programs where no neutral assessor exists, or where the course providers play this role.

First, both the learners and the instructors are free to call upon the assessor at any time that problems arise. Second, they both receive weekly reporting sheets, to be sent to the assessor. On these sheets they report on their satisfaction with their course work, on skills they have mastered, and indicate any need for further direction, or need to meet with the assessor. We have found that the weekly reporting sheets are a useful means of communication between the learner and the instructor, with or without the presence of the assessor. Third, after about two months into the learner's program, the assessor goes to the educational setting to do a followup assessment. This is an abbreviated form of the original, and provides an opportunity not only to measure actual progress, but also to reassess the learner's goals. We learn whether or not they have changed, whether or not they're still realistic, and so forth. We can also determine the learner's readiness to move on, for example, from preparatory level to skills level training. Otherwise, we draw up a new plan, and the learner continues as before.

Finally, after the learners have left the program, they receive a follow up phone call from the assessor's office. They are asked a set of questions which allow us to determine the effectiveness of the process for them. As a result, we have amassed a data base on some 300 participants over the last 2 years, and hope to publish our findings shortly.

CONCLUSION

In designing the course charting process our purpose was to show respect for the learners. We focus on their goals and aspirations. We concentrate on their abilities. We provide them with the tools they need to chart and direct their own learning. We do these things in an atmosphere of positivity and the results are tangible: a very high proportion of our learners go through to a successful conclusion.

> ***"...our purpose was to show respect for the learners. We focus on their goals and aspirations. We concentrate on their abilities."***

Owing to an accidental set of circumstances, a "control group" of non course charting learners were placed among our course charters in the classroom.
The instructors noticed a contrast between the two groups: The course charted group were more focused, more motivated and more aware of their learning styles. The instructors reported that the assessment helped them to teach a course suited to the learners needs, incorporating material from the more advanced courses that the learners were preparing to enter.

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ABOUT THE AUTHOR

Deborah LeForestier has degrees in applied Psychology and Special Education. She has 15 years experience in the Field of Literacy in both educational and workplace settings. She has presented seminars and college lectures both locally and nationally on literacy issues. As well as operating her own private school she has worked as a free lance educational consultant and diagnostician. She has authored several literacy skill inventories. Presently she is employed as an assessor with the Georgian Triangle Literacy and Basic Skills Coalition funded under the LAI of the literacy branch of the Ministry of Education.

APPENDIX I

GEORGIAN TRIANGLE LITERACY and BASIC SKILLS COALITION

SHOP MATH INVENTORY

NAME: ____________________

NOTE: The learner owns this inventory, not the institution. The learner can take it to other upgrading courses or keep it as a personal progress record. The learner can take it to class to help tell the educational partner what parts (skills) they need to know.

SKILL	CAN DO	REFRESHER REQUIRED	COMMENTS
BASIC NUMBERS with WHOLE NUMBERS			
Rounding numbers			
Adding whole numbers			
Renaming in addition			
Subtracting whole numbers			
Renaming in subtraction			
Adding or Subtracting measurements			
Multiplying a whole number by a one-digit number			
Multiplying two or more measurements with the same unit			
Dividing whole numbers			
BASIC OPERATIONS with FRACTIONS			
Changing a mixed number to an improper fraction			
Changing an improper fraction to a mixed number			
Finding an equivalent fraction with a specified denominator			
Determining equivalent fractions			
Simplifying fractions			
Finding the least common denominator			
Adding fractions with different denominators			

Page 1 of 5: To request remaining pages of the Inventory pleases call (705) 444-1580

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APPENDIX II

GEORGIAN TRIANGLE LITERACY AND BASIC SKILLS COALITION

AUTOMOTIVE MECHANIC COURSE (NEED GRADE 10)
(Preferably grade 12)

SKILLS REQUIRED TO ENTER COURSE:

Reading

-read shop manuals, text books
-read temperature gauges
-read instructions
-read and interpret blueprints

Math

addition, subtraction,
-multiplication, division,
fractions, ratio
-precise measurement
 (work to precise tolerances)
-time, money math
-ability to solve linear equations
 with two unknowns
-integers, logic, set theory and exponents

Writing Skills

-note taking
-spell unfamiliar words
-write invoices, receipts
-write short sentence answers on tests

Other Skills

-ability to visualize in three dimensions
-good eye hand coordination
-interest in computers
-communication skills
-memory skills - how to memorize, study skills - how to study
-test taking - how to take a test
-ability to concentrate and follow instruction
-ability to communicate questions and or answers to
instructors/shop personnel/customers
-ability to do estimations - hours - costs - values

Note:

This information allows the assessor to make course recommendations based on prior knowledge of the learner and what they will need to know to enter the desired course. The educational partners and the learner can tell when to make a closure of the preparatory training based on these skills being mastered.

COLLABORATIVE PREPARATORY TRAINING MODEL APPENDIX III

The Collaborative Training Model means that the learner is a full partner in a shared power arrangement with the instructor, the assessor, and the agencies providing training.

COURSE CHARTING PROCESS STARTS COLLABORATIVE TRAINING

Assessment (coded - no names mentioned) discussed with coalition if a new program is required otherwise learners are placed into existing program.

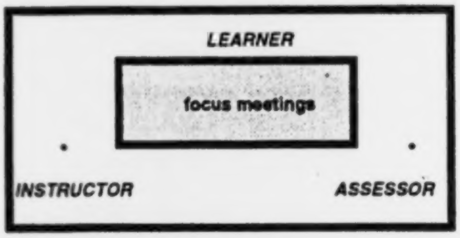
GEORGIAN TRIANGLE LITERACY AND BASIC SKILLS COALITION

- ***Educational Stakeholders***
  - ***support agencies***
- ***Assessor/Assistant***
- ***[Consumer]***

Regular meetings of *learner/instructor/assessor*

LEARNER/INSTRUCTOR COLLABORATIVE ACTIVITIES

- **Orientation** - *based on Course Charting prepared by Assessor, this helps provide contact for individualized Training*
- ***Learner/Instructor/regular reports to assessor (learner owns reports)***



Other Collaborative Activities

eg: ***- Discussion forums***

- ***assessor does reassessments at regular intervals***

SKILLS TRAINING/JOB

- ***based on learning objectives being mastered in prep program the learner goes on to a job and/or skills training / or participate more fully in their community.***

FOLLOWUP INTERVIEW

- ***Interview with assessor/assistant conducted by telephone, letter or personal interview.***
- ***Follow up records include:***
  If the person believed training was relevant
  If assessment was useful and respectful
  What are you doing now? ie. skills training, job...
  Do you require our services to help with next step?

Deborah LeForestier

HOW ARE NEW LEARNERS SOCIALIZED INTO AN EXISTING LITERACY PROGRAM?

Michael G. Wodlinger and Regina Muetze

This study examines the process that will best facilitate a literacy learner's entry into a new program. The project data consisted of observations of learners' behaviours in the classroom and transcripts of formal and informal interviews with the seven learners. Project findings indicated a three stage process of socialization or comfort building, that have been labelled (a) tentative, cautious stage, (b) initial interaction stage and (c) total involvement stage.

INTRODUCTION

Our interest in understanding how the adult learner fits into existing literacy programs began with a need to understand the processes that help a new learner feel comfortable in an existing program. Over the six years of working with literacy learners, both as a literacy practitioner and as an observer of this dynamic learning setting, we developed a curiosity and a need to increase these understandings.

We observed that some learners adapted well into the program, in a relatively short period of time, while others took considerably longer. There were a few learners who never did manage to develop a reasonable level of comfort. These learners often left within the first year.

This then became our problem focus: What is needed for a new literacy learner to feel comfortable in an existing program?

THE RESEARCH CONTEXT

This project was conducted in a school-based literacy classroom. The program was based on the principles of adult education, in that learners played a large role in the planning and implementation of their learning strategies, depending on their level of comfort and confidence. The practioner acted as a facilitator, providing direct instruction only when requested by the learner or when the learner's behaviour suggested that need.

Learners entered the program throughout the year. Over the first four years of operation, a core of learners developed a high sense of comfort with the program. This "core" created a distinct culture within the classroom; one that was characterized by a strong sense of community and an intense loyalty to both the practitioner and this community of learners.

OUR RESEARCH METHODS

We used two methods to collect information for our study: (a) formal and informal interviews with newly enroled learners and (b) observations of their behaviours. Both the interviews and the observations occurred in the first three weeks of each learner's entry into the program. Seven learners were involved in the project.

Each learner was interviewed three times, once at the entry point, once at the end of two weeks in the program and then at the end of the three week period. Periodic interviews occurred throughout the remainder of the year. The interviews were recorded on audio tape and transcribed. The transcribed interviews formed part of the analyzed data.

Observations were conducted by the program facilitator. Due to the frequent interactions between the facilitator and learners, the observations were made at random periods. Field notes were made during the day and analyzed in the evening.

"...the observations were made at random periods. Field notes were made during the day and analyzed in the evening."

WHAT DID WE FIND?

Our review of the observation notes and the interview transcripts seemed to show a pattern in the process that new literacy learners used, to become comfortable with a new learning environment. The first stage in this pattern we have called the **tentative, cautious stage**. All the new learners in the study indicated that they spent some time being deliberately distant from other learners. They claimed that they needed this time to "see how things went in the room..." and to get to know how others would respond to them. The amount of time spent in stage one depended on many factors, including (a) the time of the first contact with other learners in the classroom, (b) the first invitation to join others for coffee or "outside for a smoke" and (c) the first time that they were asked by others, if they needed any assistance, and (d) the manner in which that request was made.

The second stage we have labelled the **initial interaction stage**. At this point, varying from one day to a week or more from entry into the program, the new learners began to join others in small groups, without being invited. Although they did not all take an active role in the group discussions or activities, their presence was an indicator of their development of a greater degree of comfort with the group. The initial interaction stage appeared to last until each was asked for an opinion and that opinion was validated by the group. Once this validation occurred, the new learners felt more comfortable: "I felt they really wanted to hear what I had to say."

The third and final stage, that we observed, in the entry process was the **total involvement stage**, marked by a high degree of comfort. For some, who appeared to be outgoing and confident, this stage was reached fairly quickly, one or two weeks into the program. For others, particularly those who were not outgoing and who did not display a good deal of confidence, this stage took longer to reach. One person reported not reaching this stage of total involvement until three months into the program. One individual, who dropped out of the program after two months, reported never having felt comfortable. The reason given, by this female learner, was the high degree of control shown by many of the males in the group.

The learners interviewed indicated that their degree of comfort in the classroom was dependent upon a number of different elements. The most important of these it seems, are (a) the attitude of the practioner and (b) the atmosphere in the classroom.

A few of those interviewed had come from other literacy programs. They discussed the differences between former programs and the one recently entered. There were mixed reactions. Three learners interviewed indicated that they preferred the greater degree of "freedom" in the new program. With this freedom came the right to make choices about their own learning. They felt that the open and inviting style of the practitioner helped them to feel comfortable, more quickly.

For others this was not the case. They reported feeling more comfortable with a highly structured approach from the "teacher", who controlled and directed what they did in the classroom. They felt that the lack of teacher control in the classroom hindered their developing a high level of comfort quickly. It must be noted though that these learners, although they initially wanted teacher structure and control, soon began to appreciate their being encouraged to make learning decisions and guiding their own learning.

The atmosphere in the classroom had an important impact on the socialization of new literacy learners. Interviewed learners appeared more comfortable earlier, when they felt an invitational atmosphere in the classroom. When a learner felt a competitive atmosphere, the amount of time required for comfort to build was greater.

Another interesting finding revealed that the impact of possessiveness was quite high. One learner shared an incident, early into his entry into the program, when having sat at a particular table, in a particular chair, he was told to move. It seemed that he had taken another person's place and had violated learning space. The need to have a sense of ownership of space and place appears to be quite high among literacy learners.

"The need to have a sense of ownership of space and place appears to be quite high among literacy learners."

WHAT CAN WE SPECULATE FROM THIS STUDY?

Our findings are tentative and need to be explored further. However, from this study, we can make some tentative conjectures.

First we have speculated that new learners do go through a progressive staged process, when entering a new program. We have identified three stages, (a) **tentative-cautious stage,** (b) **initial interaction stage** and (c) **total involvement stage.** It appears that learners enter and exit these stages at different times. The "speed" at which this occurs depends upon many factors, some of which are (a) the degree of self-confidence that the learner had entering the program, (b) the degree of acceptance by others in the program, (c) the attitude of the practitioner and (d) the interactive atmosphere in the classroom.

We encourage others to also investigate the socialization of learners into literacy classrooms, community and school based. The more we know about these processes the better able we are to build effective learning environments.

ABOUT THE AUTHORS

Michael Wodlinger is an associate professor in a Faculty of Education in Northern Ontario. He is involved in preservice teacher education and the preparation of adult educators.

Regina Muetze is a literacy practitioner with an urban school board in Northern Ontario. She is also involved in the preparation of adult educators and literacy practitioners.

GROUP PROCESS IN LITERACY

PROGRAM-BASED RESEARCH

Heather Lennie Segsworth
Cambrian College

This study looks at the development of groups in literacy classes. Working from her journal notes, the author sought a framework that would help her understand what she was observing.

"While we strive for independence, we also retain throughout life our dependency needs! We require approval and support of others in order to preserve our sense of well being." (Smith, p. 44)

INTRODUCTION

While working in my Ontario Basic Skills Literacy classes where people work in groups, I have been observing how groups form and marvel at the differences. Some groups bond very quickly while others are slow to reach this point. There seem to be predictable stages that each group goes through, but the length of time in each stage varies from group to group.

The way a group forms and begins to work together seems to have an impact on the learning environment and my approaches to teaching. When individuals are comfortable within the group setting, learning is enhanced and students seem more productive, not only as group members but also as individual learners. When individuals are not comfortable in the group, the learning environment does not seem as pleasant and the levels of stress and discomfort seem higher, probably more so for me as the instructor.

I became interested in studying this phenomenon further in order to learn more about group process and to find out what role I could play as the facilitator in the process. It was a new experience for me to trust the learning I gained from my own experiences and observations.

MY BIAS

In my teaching experience, I had worked in several learning environments including large group instruction, individualized self-mastery, assisted instruction and now small group instruction. As a student I had experienced large lecture classes and small group seminars and tutorials. I definitely had a preference as a learner to the values of learning within a small group and my successes and observations as a teacher seemed to be within a small group setting as well. "The group in learning situations has a powerful effect on energy expression. Learning is social and interaction with others can energize learners " (Boud, p. 45).

I had (and still do have) a bias towards the importance of learning within the group. Therefore, my research was not to determine whether or not group learning was better than other types of learning/instruction, but to observe and learn how groups develop.

"I kept periodic notes in my daybook on observations made, interesting occurences and personal feelings about any interesting events or observations. These notes were my way of venting and recording my new learning experiences."

CHEATING?

For two years I had carefully observed my students and their participation, or lack thereof, in the class setting. I kept periodic notes in my daybook on observations made, interesting occurences and personal feelings about any interesting events or observations. I had no intention at the time of ever writing a paper on this subject. These notes were my way of venting and recording my new learning experiences.

However, when I decided to use these observations as a basis for a research paper, I was afraid that I would be cheating. I had done research papers before as a university student, but the professors had always demanded a certain style and a great deal of theoretical background. I was now going to do the opposite.

Not having a strong background in group theory, I had to rely on my personal observations. It was at this point that I felt reading about group dynamics would help prove the validity of these observations. With pen and paper in hand, glasses cleaned and sparkling, and a curiosity that had to be satisfied, I headed to the library to empty the shelves of all books pertaining to this subject.

SCANNING THE FIELD

I read many theories and attempted to see how my observations were fitting in. There were excellent theories about group stages, but to my disappointment, I didn't feel that my groups' experiences fit most theories. I began to feel despondent. I felt that I must have really been off base in my observations and perhaps I was just seeing what I wanted to see. I did try to squeeze my observations into some of these theories, but then I realized that I would be compromising what I thought I knew.

I turned to one last book lying on the table and was suddenly elated to find a seven-stage model for cooperative learning groups derived by Johnson and Johnson in Joining Together: Group theory and Group Skills from Tuckman's 1965 model of group development: forming, storming, norming and performing. Eureka! This adapted model really fit into my own personal observations. As I read Johnson and Johnson's seven stages, I was able to see examples from my own class setting fitting into these seven basic, predictable patterns of group development. I was then able to write the paper.

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PERSONAL LEARNING

Finding that my personal observations fit into a theoretical framework was a positive reinforcement for me. It seemed to give validity to my own theories. I found comfort in knowing that others had observed group development and saw that learning groups did indeed follow certain patterns but still can vary a lot in length of time spent in different stages. I learned not to expect the same thing from each group; that each one could be unique and the dynamics would be different each time. If, at times, things became tense, I would not always blame myself.

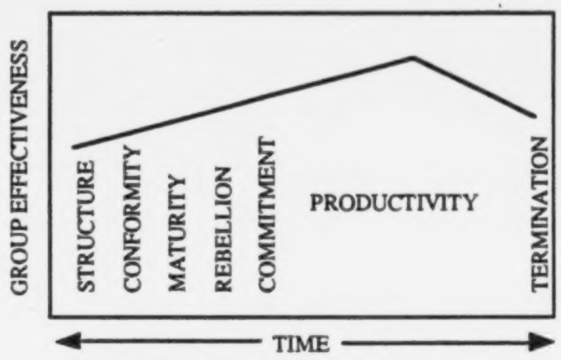
"I learned not to expect the same thing from each group; that each one could be unique and the dynamics would be different each time. If, at times, things became tense, I would not always blame myself."

I grew more confident in the role I played as instructor and group facilitator. When new groups start, I realize that there is a need for me to play a more directive role, eventually stepping back when a group and the individuals in the group have reached the "Productive stage". Then they rely not only on me, but on each other and on their own personal instincts and self-identified goals. In a video made by one of my groups, the following was stated by Jackie, one of the students:

> At the beginning, you were steady with us because we really needed you to guide us, but as we started to go along, you sort of weaned us off and just let us go on our own. You directed us and gave us help when we needed it.Then you left us on our own to prepare us for later on.
>
> The first few weeks were the hardest because we didn't know one another, but after that we became a family. We all had the same problems and we helped each other.

Through constant observation and personal reflection, I have learned which facilitating techniques have worked well for me and which ones have "bombed". The "bombs" I discard; the gems I make sure are saved in a file and used again. My most important role is to create a friendly, sincere and comfortable learning environment.

Figure 1: Stages of Group Development



(adapted from Johnson & Johnson , "Joining Together", 1987)

GROUP EFFECTIVNESS
(Johnson and Johnson, p.362-363)

1. Structure: Defining and structuring procedures and becoming oriented.

   Facilitator defines procedures, explains tasks, establishes cooperative interdependence among members, announces beginning of group's work.

2. Conformity: Conforming to procedures and getting acquainted.

   The group members become acquainted with one another and familiarize themselves with procedures. The facilitator still plays a strong role but learners begin to develop "group feeling".

3. Maturity: Recognizing mutuality and building trust.

   Group members recognize cooperative interdependence and build trust among themselves. They begin to take responsibility for each other's learning and appropriate behaviour.

4. Rebellion: Rebelling and differentiating.

   Members may rebel against the facilitator and procedures. Disagreements and conflicts may arise among themselves. There is a shift from dependence to interdependence.

5. Commitment: Committing to and taking ownership for the goals, procedures and other members.

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> There is a feeling of ownership of the group. Cooperation among members is high and members become committed to each other and truly become friends.
>
> 6. Productivity: Functioning maturely and productively.
>
> There is a definite sense of group identity. Members work together to achieve learning tasks. A strong sense of pride emerges.
>
> 7. Termination: Learning group ends and members go their separate ways.

BENEFITS OF GROUP LEARNING

My belief in the strength of group learning has also been reinforced.

> The opportunity to learn from peers is central... Then in a climate of trust and mutuality, learners can take risks in testing out new ideas and behaviours.They also have access to feedback and the opportunity to learn from differing viewpoints of others. Such learnings, however, are likely to occur only if deliberate efforts have been made to promote trust, openness and interactions. (Boud, p. 130)

Since reading and writing are not the only elements involved in literacy, the lessons learned in group interaction play an important role in self-growth. Some of these elements take on far more importance when you read What Employers Want in a document prepared for the Conference Board of Canada. Thinking skills, communication skills, positive attitudes and behaviours, working well with others are examples of skills highly valued by employers. These can be developed in groups.

WHAT GROUP LEARNING CAN PROVIDE

Opportunities for:

1. learners to take a direct and active role in activities;
2. raising self-esteem;
3. sociability, a chance to hear other ideas and to test one's ideas on fellow learners;
4. reflection;
5. helping one another to clarify individual needs and become resources for each other's learning;
6. practising something one can use at other times and in other places;
7. planning, sharing, talking things out and solving problems;
8. less isolation;
9. working things out together;
10. change, which is easier to effect in group settings;
11. feedback from a trusted other so one gets a sense of success or failure - in a group this feedback is immediate;
12. learning from one's peers - other group members can provide alternative perspectives that contribute to learning.

NOT FOR ALL

Despite my own bias towards group learning, I have also learned that not everyone can or wants to function in a group setting for one reason or another. Some adults prefer to work alone, perhaps because of a preferred learning style or perhaps a desire to maintain anonymity. Some adults prefer not to socialize with others. Other adults are inclined to be very self-directed and wish to pace their own learning individually. Sometimes individuals in a group simply do not get along.

For whatever reason, if a student cannot manage within a group setting, alternative arrangements are made. Sometimes referral to another program is the best answer and, in the best interests of the student, that is what I do.

THE BEST LESSON

The most important learning experience that this small piece of research gave me was the realization of the importance of observation in my own classroom. There is a wealth of learning all around me and I have learned to trust my own instincts and abilities. Although there is, indeed, a lot to be learned from texts and journals, there is also a lot to be learned right under my own nose.

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ABOUT THE AUTHOR

Heather Lennie Segsworth is an instructor in the Ontario Basic Skills literacy program at Cambrian College in Sudbury. The winner of the 1991 Association of Canadian Community Colleges Teaching Excellence award, Heather says that teaching in the literacy program has had a very significant impact on her life. Heather coordinated the development of a literacy practitioner training course designed for Northern Ontario practitioners. She is the recent past co-chairperson of the Ontario Literacy Coalition.

THE ESL AND LITERACY BRIDGING PROJECT

Judy Bernstein and Lori Rothschild
Algonquin College

This article describes a curriculum development project that was allowed to evolve towards an initially undefined outcome. The authors describe their strategies in "trusting the process".

It sounded almost too good to be true. We had just met with the director of our department to discuss a project she wanted us to take on for the forthcoming year. We had been colleagues in the ESL department and knew each other well. We looked forward to working together again. The proposal had been written and accepted by the funders. The first cheque was deposited. The subject area was one that we were both experienced in. We both strongly felt that development was desperately needed in this area, although we did not originate the proposal. We could create our own work schedule and the time frame seemed realistic. (It always does . . . initially.) Yet there was some hesitation, a degree of uncertainty.

The reason was this. The proposal was designed in such a way that the final product remained totally undefined. The design allowed for a substantial field inquiry. One third of the project time (and funding) was allocated to literature search, critical review of existing materials and programs used by our students and extensive consultations with the adult students and instructors. The intent was that the inquiry process itself would identify the outcomes of the project. Both of us being more product, rather than process oriented by nature, being typical time-strapped teachers, felt some apprehension about the ambivalent, undefined nature of this task. We wanted to know what we were getting ourselves into. Are there any scientists out there who really begin their research without any assumptions about possible results or outcomes? It was a bit like that.

The more we thought about it, the more intrigued and excited we became. We quickly realized that if we could allow ourselves to trust the process of consultation, openly and freely, unencumbered by our own biases and personal preferences, whatever evolved would work for a large number of people. This collaborative, consultative process was used to develop interactive ESL and literacy material that would suit adult students whose second language was English. They may have been in Canada for several years or only a few. Their literacy skills in English were at beginning levels in a community college upgrading program. Their level of ability in grade school equivalents would be 0 to grade 5. They could communicate orally in English adequately and could understand English instruction. The product had to suit their teachers, individuals with a variety of teaching styles and a broad range of experience. Our funding was federal and provincial, therefore the materials should be appropriate all across Canada. Educational funds were shrinking, the product would have to be inexpensive to acquire and use.

"We had no idea what shape or form such a product would assume. The inquiry process was looking more and more plausable and exciting."

We had no idea what shape or form such a product would assume. The inquiry process was looking more and more plausable and exciting. We accepted and what follows is a brief description of how the Bridging Materials were developed.

NEEDS ANALYSIS

College upgrading programs had been initially designed for a population whose first language was English and who, for the most part, had been born in Canada and gone through a Canadian school system. These students may have decided to enter the work force before completing high school and later on, decided to return and complete their studies. They were fluent in the language and were completely familiar with the Canadian cultural environment. The resulting programs concentrated in reading and writing skills, mathematics and science. The population in college upgrading programs in Ontario has very much changed to reflect our current multi-cultural society. In particular, many ESL students, upon completion of their 6 months of government sponsored ESL instruction, have quickly realized that a grade 12 certificate is essential to entry into further training programs and the job market. The original program design and instructional materials were not addressing the particular needs and interests of the ESL, beginning English literacy adult student.

In order to help bridge the gap that the ESL group experienced in moving into an upgrading program from the work community or ESL training, we began an extensive round of consultations. We met with students in adult ESL programs and students in upgrading classes. We met in groups of twenty and brainstormed together. We asked three simple questions:

1. What do you enjoy in your program?
(materials, activities, methodology, content etc.)

2. What do you not like about your program?
(materials, activities, methodology, content etc.)

3. Do you have any suggestions?
(materials, activities, methodology, content etc.)

The recording procedure was very simple. We taped sheets of flip chart paper to the walls and wrote the questions at the top as headings. One of us recorded each response on the appropriate sheet of paper, while the other led the discussion. Later on, comments from all the student consultations were collated and recurring comments were tabulated and priorized.

Although the data was accumulated in a very simple manner, it was also graphed by computer (at a later date) and the results mirrored the initial findings.

We asked faculty members, in both ESL and upgrading programs, to fill out a more detailed questionnaire regarding their perception of specific skills to be stressed, topics of interest and relevance, methodology, linguistic needs and materials preferences.

PARTIAL SAMPLE OF SURVEY FORM

Faculty Priority Survey

Please rate the items (by number) according to the following scale and return by May 31, 1991 to Judy Bernstein or Lori Rothschild.

Rating Scale
1 top priority
2 important
3 not a priority

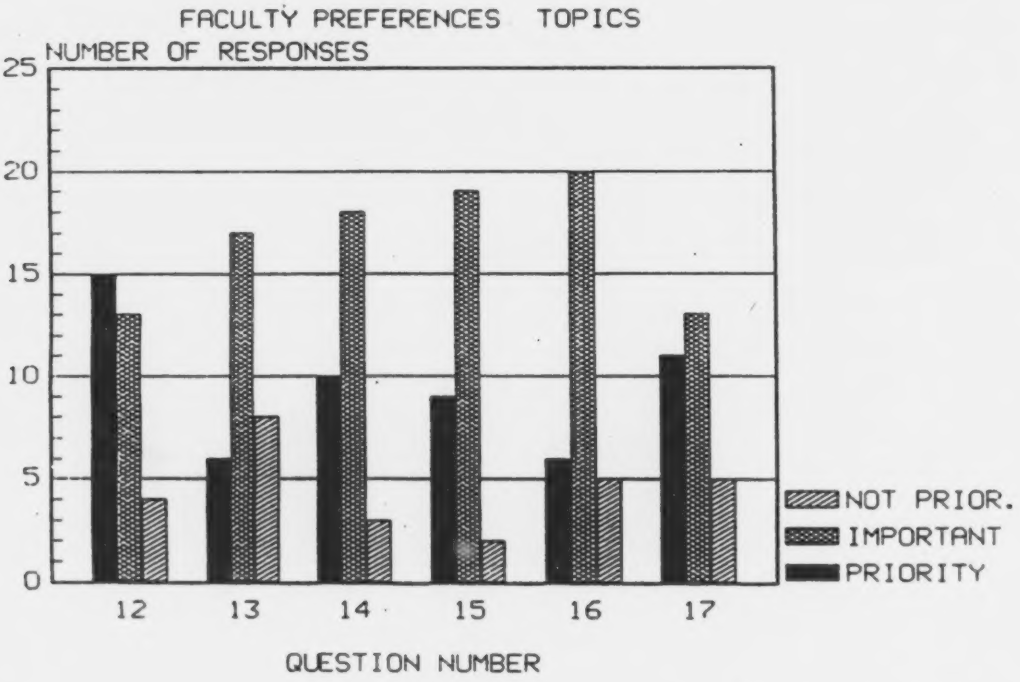
Format **Rating Scale**

1. Provide an interactive format (pairs, groups, classes) 1 2 3
2. Provide an individualized format allowing for independent learning 1 2 3
3. Provide the student with a written framework of topics and skills 1 2 3
4. Design a flexible format that allows instructors to insert current material on an ongoing basis. 1 2 3

Skills

Provide instruction in the following areas:

18. - pre-reading, basic literacy skills 1 2 3
19. - spelling strategies 1 2 3
20. - grammar structures 1 2 3
27. - pronunciation 1 2 3

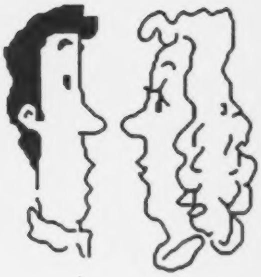


We organized all the feedback into spacific areas, i.e. content, format, methodology. We grouped items under each topic followed by a simple rating scale. We sent the items out to our consulting groups to be priorized. We collated the material and identified the top twelve criteria as being priorities to incorporate into the design of new materials.

Based on our consultations, the format should allow for:

- interactive activities which encourage oral/aural components
- authentic material
- regular updating
- eclectic teaching strategies
- Canadian subject matter
- relevant, mature and factual content
- an organizational format and structure for students
- pronunciation and everyday conversation practice
- student input into choice of materials
- diverse needs of multi-cultural and multi-level classrooms
- adaptability to regional differences
- flexibility and responsiveness to different teaching and learning styles

We carried out consultations with the following individuals and groups:



- Board of Education, Continuing Education, Second Language and Literacy Services providers
- Secretary of State, Department of Canadian Studies
- EIC (Employment Immigration Canada) project managers
- NALD (National Adult Literacy Database)
- Regional Literacy groups via the Ontario Basic Skills "Renewal" Conference (May 1991) and the TESL Ontario Conference (November 1991)

We arranged to meet with the directors of similar programs in the Ottawa Boards of Education as well. They were quite anxious to participate in the discussions and requested that the results be shared.

Algonquin College was on line with the NALD network. This allowed us to conduct a thorough search of all current programs that might be relevant to this project.

RESULTS: THE PRODUCT

It became quite evident early on in the project that most beginner programs in colleges address two ranges of language ability. We describe the first group as the Beginning Readers of English. Students working at this level may not read in their first language or may be able to read English up to a grade 2 or 3 equivalent. This group is still mastering the mechanics of reading as well as developing their vocabulary, pronunciation and writing skills.

We describe the second group as the Advanced Beginners. This group has mastered the mechanics of reading, however, there are gaps in their skills and grammar and writing in particular require practice.

1. We designed a consumable book for the Beginning Readers. The students will own their own books. They may therefore write in them and use them for reference and practice. Part of the material in this book is reference for the students. It also presents the student with a sequential and integrated development of reading and writing skills. Taped readings are about Canada. They are followed by practice exercises and individual, paired, and group activities. All the instructional pages are taped. Some of the topics covered in the readings complement those in the resource kits described next.

2. We produced kits to meet the needs of Advanced Beginners. The titles are Canadian History, Canadian Geography and Canadian Culture. As a result of recent publications on the topics of Canadian government and citizenship, we provided a list of titles that could comprise a kit covering these subjects. Most of these materials are free to residents of Ontario and they are written at a beginning reading level.

The activities in each kit are interactive. The kit format was deliberately chosen to permit maximum flexibility. Material can be substituted to reflect regional differences. Readings and activities can be done in any order. The information base can be expanded easily by simply slipping newspaper articles, brochures and maps into the folder pockets. Outdated material can be replaced without tearing anything apart.

The intent of this format is to permit the instructors and students maximum freedom to use the material in the way that best suits their needs and interests. We have tried to remove the constraints associated with the format of a bound book in direct response to feedback from the consultations.

EVALUATION

We wrote to the directors of Adult Basic Education Programs at ten Ontario Community Colleges . We asked them to identify evaluators who were working at basic levels and who had many students in their classes whose first language was not English. We mailed these teachers copies of the materials and evaluation forms. We asked them to field test the materials and return the evaluation forms after three months. Although we have further details of the evaluation process, that would be a paper in itself!

RECOMMENDATIONS

1. Interdisciplinary Production Teams

It was extremely advantageous to this project to marry the expertise of three disciplines, in this case, ESL , Adult Upgrading and Literacy. We found the process of writing as a team as well as sharing the perspectives of different disciplines very beneficial and would suggest the use of multi-disciplinary writing teams where appropriate.

2. Part time Production Time

We organized our project time in a way that allowed us to teach half the week and then write the remaining half. We recommend that project work and classroom teaching be done concurrently where feasible. This allows continuous access to students for consultation and evaluation. It allows the writers/instructors time to process the information related to the project, to reflect and to develop their ideas. It also permits a longer time span for correspondence and communication to occur.

"We recommend that project work and classroom teaching be done concurrently where feasible."

3. A Consultative Process of Writing

We recommend that all projects include an initial stage of consultation with the population of potential users. This activity should be allocated sufficient time and funding in every education project. User input is essential in the production of realistic, relevant and practical material in education.

More information or order forms for
The Bridging Materials can be obtained from:

Judy Bernstein
Algonquin College,
Department of Career and College Preparation,
room J205
1385 Woodroffe Avenue,
Nepean, Ontario, K2G 1V8

ABOUT THE AUTHORS

Lori Rothschild has been teaching ESL at Algonquin College in Ottawa, since 1980. During that period, she has developed and implemented many new programs in the ESL Department. She has completed a joint project with the Career and College Preparation Department at the college which has resulted in the publication of the Bridging Materials.

Judy Bernstein is currently teaching beginning communication and numeracy skills in the Career and College Preparation Department of Algonquin College. She combines her M. Educ. training in reading with over 15 years experience in adult literacy, ESL and upgrading instruction as well as materials and program development.

TRIAL, ERROR AND BACK TO THE DRAWING BOARD

Suzy Harris

The biggest impression, as I look back on doing an evaluation of a literacy program special project, is of the amount of time it took. Time to decide to do it, time to design the questionnaire, time to make appointments, time to consult with advisers and receive opinions back, time to drive through the countryside, time to decide what to write as a report and how to write it and time to fit the evaluation work into other parts of life. It also means ***time to learn and change as you go along****. For an evaluation seems to have a life of its own and as time proceeds you can easily find that you must follow a "Trial, error and back to the drawing board" method.*

THE PROJECT

The project I am describing was done for the Wellington County Literacy Council YOUth Project. The Council provides one-to-one tutoring help outside the school system to students from 12 to 18 years of age. The YOUth Project gives young people an alternative choice of help to the peer tutoring programs within the schools. The Council received initial funding from the Literacy Corps, through Employment and Immigration Canada and the Ministry of State for Youth, and follow up funding from the Stay In School Initiative, under the Job Strategy Unit of Employment and Immigration Canada. With the project time-line and funding nearing completion, new inquiries were coming in at the rate or two or three a week.

The purpose of the evaluation is to provide a document to give to funders at the same time as giving project staff information on the strengths and weaknesses of their project. An added feature of the questioning is a look at the YOUth Project tutors in their roles as volunteers in Wellington County. We hoped to evaluate how well or poorly the project was working; we hoped to be able to recommend improvements for the YOUth Project, as well as for all the Council's programs, specifically in the area of tutor training and support; and we hoped to inform funders on what the YOUth Project is now and could, in the future, provide for the young people of Wellington County.

THE METHOD

Three meetings with program staff gave us all an idea of what we wanted to accomplish. Next was the formation of an Advisory Committee, which consisted of the YOUth Project Co-ordinator, a learner, a parent and myself. From directions suggested in the Program-Based Research Special Interest Group's manual, Seek, Gather and Process, and from the brainstorming done with staff, we had concrete proposals for discussion, including three questionnaires. The committee's opinions were very useful, validating many suggestions and proposing changes and removal of some others.

QUESTIONNAIRES

The original plan had three similar questionnaires to be given in person by the interviewer who both wrote the answers and taped the interview. The original triad, which included the learner on the Advisory Committee, was interviewed as a form of pilot of the evaluation project.
Two serious problems were shown during this trial:
1) the tape recorder recorded poorly, due to my desire to have it unobtrusive, and
2) the results from the three interviews, while very interesting and revealing, could not be imagined as a portion of a cohesive report.

Apart from putting all of everyone's interview into the findings of the evaluation, it would be virtually impossible for the information to be generalized into cohesive findings.

I learned more about focussing a project. The important things I needed to clarify in my own mind are:

1) what do I want to evaluate?
2) what do I need the information for?
3) what will be the action at the end of it?
4) in what form will the findings be presented?

HELP AVAILABLE FOR THE RESEARCHER

So, back to the drawing board, but this time with an insight into what I was really asking and what I wanted to do with the results.

My drawing board became a consultation with an expert, a professor at the University of Waterloo who does research in the health field, and his wife who is working on her Masters of Education degree and is interested in the literacy field.

Their suggestions helped me to quantify some of the qualitative things I was looking at. For example, instead of asking a tutor what she thinks of the training provided by the Council, I asked her to rate how prepared she was for tutoring, the importance of tutor meetings, and her knowledge of the materials available.

Example:
How confident were you when you started tutoring? (Very confident, moderately confident, not very confident, not at all confident)

1) in your own abilities
2) in your training
3) in handling the personalities and/or problems

4) in your learner's ability to do the work you planned
5) in your learner's ability to stay with tutoring
(Note: Learners had a very similar question.)

In some cases participants were given a large number of words and asked how often the words described their feelings about tutoring. (always, most of the time, some of the time, never)

Example:
comfortable, isolated, unsure of self, happy, wish you could quit, bored, embarrassed, rewarded, etc.

In all cases the participants were allowed to add comments of their own. Of course, with a tape recorder going, the chat becomes data.

An invaluable tool in doing an evaluation for a literacy program is a document produced by Charles Craig, "Analysing Qualitative Date". In this document he says:

> Using a qualitative research methodology ... *will* lead to further understanding of the scope and dimension of your questions. It is such understanding that will lead you to solutions.

All this takes time. I hate to stress the time element in case it would keep someone from undertaking an evaluation, or other type of research. However, I urge people to avoid, if at all possible, having a time line sword hanging over a project. Another thing to avoid is such rigidity that the project cannot change as it proceeds. Using questionnaires, as I did, necessitates basing interviews on the same questions for all the participants. It does not, however, exclude the qualitative information which comes out during a personal interview. And that information is important in the final report.

WHAT DID THE TRIP BACK TO THE DRAWING BOARD PRODUCE?

The revamped questionnaires have 17 questions in common for the learners and parents, all but two of which are on the tutor questionnaire. The learners have some extra questions on specifics of their learning and their feelings about the process, and the tutors have several extra questions about their training and support system.

The most difficult thing to measure in an evaluation of a literacy program is the amount of learning that is taking place. This became the biggest hurdle to me, my consultants and the program staff. The final questionnaires have a list of things that might have been learned. Each member of the triads was given the same list. They were asked if they feel the learner has improved, has much improved or is the same in doing each task.

Example:
reading, oral reading, spelling, math, comprehension, writing, homework for school, grammar, vocabulary, verbal communication, problem solving, decision making, self esteem, basic skills, other

The answers are interesting, not only for the assessment of skills but for the showing the perception each person has of the learning that has taken place. The learners and the parents, on average, identified that the learning was greater than the tutors thought. In my opinion, this showed in one more way the desire the tutors voiced frequently, that they do an even better job than they are doing. There is a very great commitment by tutors to do a good job.

"A few years ago I sent a questionnaire to all the students in the program I was active in. One came back with excellent, full and interesting answers. The last question was, 'Is there any other thing we can do for you?'

The answer, 'Don't send any more of these damn fool questions!'"

IS DOING AN EVALUATION WORTH WHILE?

For the researcher, very much so. The interviews are a wonderful experience. I found that **all** the participants want to talk, want to tell me how much the program means to them. In particular, the tutors are grateful to be asked their opinions, their worries and their feelings. Also, working closely with a supportive staff is a pleasure.

"The problem of coming up with a methodology that would do what I wanted was a very difficult and daunting challenge. The trial of the three original questionnaires, while time-consuming, saved the project from an unfocussed mass of material."

The problem of coming up with a methodology that would do what I wanted was a very difficult and daunting challenge. The trial of the three original questionnaires, while time-consuming, saved the project from an unfocussed mass of material. I had learned in theory the usefulness of an Advisory Committee and a pilot project (from using as a resource, Seek, Gather and Process: A Research Manual for Literacy Programs and attending a workshop on doing a literacy research project). I need to get into the middle of the work before I fully appreciate the value of the tools I have been given.

I never solved the problem of putting all I had into a report. I compromised by efficiently summarizing numerous things, then adding an appendix which contained five pages of quotations from the participants. Without all those who generously talked to me there would have been no evaluation. Their words deserve to be part of the result.

HOW WORTHWHILE IS THIS EVALUATION FOR THE LITERACY PROGRAM AND THE YOUTH PROJECT?

That will take time to answer. The program staff have validation of the usefulness of their present methods of support, some suggestions for changes and, hopefully, improvements. Funding is secure for the present time and they now have a tool to continue to look for other funding sources. Everyone learned a great deal from the process of the evaluation, as well as from the results.

"This (the YOUth project) is like the farmer putting one grain of wheat in the ground. What they get back is more important that what they put in."

A quotation from an anonymous participant in the evaluation.

ABOUT THE AUTHOR

Suzy Harris had been actively involved in the literacy field since becoming a volunteer tutor in 1978. At the present time, she is associated with the Literacy Council of Kitchener-Waterloo, the Wellington County Literacy Council and Laubach Literacy Ontario.

EVALUATION AND CHANGE in a LITERACY PROGRAM

Patrick Cummins

The Learning Centre Evaluation was a two year project to describe and assess how and how well the Centre achieved the goals set for it by the Ottawa Board of Education and its partners. Because TLC is an experimental project in a quickly evolving area - using computers in the provision of ABE instruction - an unusual amount of effort was put into research. My time, as research coordinator, was devoted exclusively to this project; I had the support of a knowledgeable and involved Research Committee; and I spent every Friday morning reviewing, planning, and analyzing the week's work with Professor Stan Jones at Carleton University. The final report, The Learning Centre: Adult Basic Education Using Computers (2 vols.) is available from the Ottawa Board of Education.

These days, many Ontario literacy people are concerned about the effect evaluations may have on their programs. They worry that evaluation will lead to reduced funding or to compromises in the integrity of their programs. They probably shouldn't worry: Evaluation literature shows that (1) most funding is awarded on other, often political, grounds; and (2) given the right conditions, evaluation helps improve the quality of programs.

This article reports positive changes that have taken place at The Learning Centre (TLC) in Ottawa since the completion of and evaluation there two years ago, and it describes some of the ways the evaluation was involved in those changes. There were a number of positive changes, but this article concentrates on one example - the shift from one-on-one delivery to a group-oriented model of delivery.

WHAT BROUGHT ABOUT CHANGE AT TLC?

One example: Group instruction

During the period of the research, most instruction at TLC was one-on-one. Two years later, according to the current TLC Coordinator, group teaching is the norm rather than the exception. Significant number of groups (4-9 students each group) meet two times a week on regular schedules.

There were many factors impelling TLC towards group instruction, some relating to the research process and some not. This article examines five factors which do relate to the research process and research report, and it shows how they were involved in the change:

(1) The report served as a learning resource and **discussion document** for teachers.

(2) It provided a set of **goals** for achievement within a specific time frame.

(3) It provided a local **focus** for the promotion of overall program goals.

(4) There was project staff **reaction** to the researcher and the research process.

(5) The Education Officer from the Ministry of Education used the report to encourage **compliance** with regulations regarding class size.

(1) Discussion document

The final version of the evaluation report became available for TLC staff at about the same time as a new

Coordinator was appointed to TLC in the late Spring of 1991. Beginning the following autumn he used the report in a step-by-step process to manage professional development, a main feature of which became a shift to group instruction. The steps were:

- *Becoming familiar with the report:* Teachers and Coordinator spent many of their regular Friday morning meetings going over the research report. Whether or not staff were in sympathy with the ideas contained in the report, they became familiar with it.

- *Discussing specific issues:* Teachers were encouraged to comment and offer opinion on specific elements. According to one teacher, "at this point it was just sort of raising our awareness of these particular things."
- *Generalizing:* Through consideration of particular elements, discussion turned to general principals and philosophy of the Centre. Staff began "to start examining premises and objectives of what we'd been doing."

- *Experimentation:* Discussion gave place to action - "talking about those things and then trying some new things and seeing if they worked any different."

Group and collaborative teaching methods were among the 'new things' tried. Teachers found, sometimes to their surprise, that this could be effective and enjoyable.

(2) Goals

Centre Staff selected program development goals from the report. An upcoming Advisory Council meeting set a time limit for implementing these goals, several of which related to group teaching.

An Advisory Council, made up largely of funders and sponsors, had been meeting regularly since the project began, to discuss funding and policy matters for the Centre. Sometime prior to one meeting, the program coordinator (responsible for ABE and ESL in the Ottawa Board) instructed Centre staff to prepare presentations for delivery at that meeting. This gave the TLC coordinator and staff the impetus to bring their ongoing deliberations and experimentation to a kind of closure.

Different people at the meeting used the report in different ways:

One teacher remembers that the Education Officer "had a copy of your research, going through each point saying, 'Well, what have you done about this, and what's been done about this?'" One of the officer's chief concerns was mode of delivery. Six teachers made reports on TLC activities; two of these were on initiatives having to do with group teaching. Documents from this meeting show a list of eleven recommendations from the research report which TLC "has looked at ... with a view to implementing".

(3) Focus on program-level goals

The program coordinator used the report to encourage adoption of policy elements, one of which was a greater emphasis on group teaching.

There was a move in most OBE programs to group students according to ability or interests and to employ group instructional techniques. TLC would have been encouraged to move in this direction in any event; the research report provided a lever to advance this movement. The ABE Coordinator sometimes attended TLC staff meetings and used the report to focus on the need for deliberation on collaborative or group learning.

(4) Reaction to the researcher

Positive and negative reaction to me as researcher/ evaluator encouraged teaching staff to experiment with group instructional techniques.

I was known to favour group instructional techniques. Some staff had the impression that the job of an evaluator was to make negative judgements. This sometimes encouraged them to do things to prove me wrong. One teacher explained, "Sometimes when someone is, ah… gets your goat up, sort of riles you, you're sort of more alert to the things that they're saying, and you address those maybe more energetically… either to vindicate yourself or to prove the other wrong or to fix it, somehow." During the time of the evaluation, several teachers experimented with group teaching, even though it was explicitly counter to TLC policy.

(5) Compliance with regulations

The report provided evidence that some TLC practice was at odds with Ministry regulations which anticipated group rather than one-on-one instruction.

The Education Officer, who was a member of the Advisory Council, saw some of his work done for him

The one-on-one teaching model described in the report did not conform with his understanding of the requirements for 'small classroom calculation', the basis of financial support from the province. He recounted that with funding temporarily in jeopardy, "there were some things, such as class organization that changed ... for the better."

OTHER FACTORS

It would be ego-enhancing for me to think that my research efforts had single-handedly brought about such fundamental changes in practice; it would also be a sign of derangement. Other factors which had nothing to do with the research had important influence on changes at the Centre:

New location: The Centre's old location had consisted of one large space and two smaller spaces. When the Centre moved to a new building with more and smaller rooms, it was more practical to group students according to particular activities in those rooms.

Administrators' philosophy: The ABE coordinator spent six months preparing a policy document for a national literacy organization shortly after the report was submitted and shortly before its recommendations began to be implemented at the Centre. She honed and developed confidence in some of her own ideas at this time - in particular, convictions about the virtue of group teaching. As well, the newly appointed TLC coordinator had previously employed and promoted group teaching techniques.

Cultural experience: One of the teachers spent six months abroad and returned to Canada with new perspective on students working together. He observed, "It was almost as if we were protecting students from other students. ... It's difficult to pin down when I kind of thought differently about it. It might have been the time I spent in Africa."

Training: This same teacher obtained a teaching certificate on his return. His professional training stressed the importance of group learning.

New courses/teachers: ESL instruction was officially introduced to the Centre; ESL methods rely heavily on group work, especially for conversation.

There was a ripple effect with one idea, initiative, or event running up against and affecting and being affected by others. Research was one of the factors. It appears to have been, and continue to be, a central factor - but it did not have its effects in isolation.

"An organizational culture which stresses learning facilitates change."

LESSONS FROM THIS EXPERIENCE

Philosophy of evaluator and management should be in fundamental agreement. Approaches to ABE of the original project management and the evaluator were often opposed; in this adversarial atmosphere, no fundamental changes took place. With a change of management, the philosophies of project and program management were in concert with the philosophy of the report. It was then that large changes began to take place.

An organizational culture which stresses learning facilitates change. With a collaborative management style replacing a more directive management style, staff 'enlightenment' was encouraged through a variety of means: workshops, direct communication, publications which numbers of staff worked on, curriculum and program development involving instructors from different parts of the program; meetings where team members worked to come to consensus on project goals and elements; openness to learning at the management level; and fluidity and ability to capture and take advantage of learning moments.

Careful planning promotes efficient use of limited resources and time during the research process

The Research Committee included two people from the school board, a professor from Carleton University, and an educational software developer and marketer. These advisors helped design research questions to develop information which would be useful to a wide variety of interests. Their monitoring assured that research methods were ethical and credible and that analysis reflected the data. This assured that when results were published, they were taken seriously rather than being considered the unsubstantiated opinions of the researcher.

TLC has implemented or is implementing many recommendations from the report:

- upgrading computers - acquiring hard drives and WP software with spell checkers;
- focusing on creative uses of existing application programs, rather than developing original software;
- providing computer training for teachers;
- implementing curriculum aimed at widening students' understanding of the world (theme units, field trips, guest speakers, wider use of authentic materials);
- providing activities to encourage group interaction and collaborative learning;
- scheduling group instruction;
- acquiring and reviewing new software on a regular basis;
- developing a computer software model to track student achievement, goals, and materials;
- acquiring knowledge databases such as encyclopedias;
- providing services to other literacy providers and agencies which are seeking services for their clients;
- systematically assessing student achievement using portfolios which refer to goals and include student writing and projects.

Different kinds of information need to be targeted to different stakeholders

Different people used different parts of the report:

- Teachers at TLC considered mainly the sections that were marked or written up as 'Recommendations'. They were uninterested in descriptive or statistical information, which they felt they knew all about.

- The member on the Advisory Council representing the Ministry used descriptive data to monitor compliance with regulations and used the recommendations as a checklist, asking what the Centre had 'done about' them. He and the first TLC Coordinator, who used the report for public relations purposes, were also interested in statistical information.

- Managers, especially at the program level, appeared equally interested in the analyses and recommendations and the data leading to or supporting these, and sometimes used this information to generalize to other sites.

Since different stakeholders used different kinds of information to support their different activities, separate small reports might have been more effective than one large one.

"While careful planning and implementation made the evaluation credible, a learning culture was needed to make it useful. Without this condition, the evidence and recommendations of the report would have moved from printer to shelf without affecting anything."

CONCLUSION

In this example, change took place because of many factors - some relating to the quality of the evaluation and some related to the organization within which it took place. While careful planning and implementation made the evaluation credible, a learning culture was needed to make it useful. Without this condition, the evidence and recommendations of the report would have moved from printer to shelf without affecting anything. Although this study examined only the shift from individual to group instruction, it is reasonable to believe that, had we looked at other changes, we would have discovered equal dependence on a variety of factors.

ACKNOWLEDGEMENTS

Support for this research came from the National Literacy Secretariat of the Department of the Secretary of State. I would like to thank teachers, administrative staff, and students at TLC and my Research Committee - Joyce White (OBE), Stan Jones (Carleton University), Christina Fiedorowicz (Autoskill Inc.) and Peggy Wightman (OBE) - for helping me through this learning experience.

ABOUT THE AUTHOR

Patrick Cummins works in ABE and ESL as a teacher, researcher, and materials developer. He is interested in student assessment and the instructional use of television. His publications include a textbook series for Nigerian Secondary Schools (1983, 85, 86) and A Resource Guide for the CAAT (1993).

DIALOGUE
QUESTIONS OF A NOVICE RESEARCHER

The following is an edited dialogue between Suzy Harris and Michael Wodlinger dealing with some of the issues around program evaluation. We hope that the results of this dialogue are informative and instructive.

Michael: Suzy your paper is an important one because of the process you went through and the information you found. I wondered why you felt the need for a quantitative approach and why you had so much difficulty with a qualitative approach?

Suzy: In going through this and having trouble putting it into form, I was trying to see the shape of the report as I was designing the project. The project was aimed at evaluating a program in the hopes of getting more funding. In consultation with the program staff, we wanted to broaden the project to give us some idea of the program's strengths and weaknesses and to also focus on tutor training and tutor support. But the primary object was to get something for funders, necessitating quantitative, factual reporting. I think I have a mindset that says to me an evaluation is something you can measure. Is that an important word, measure?

Michael: It really is. Yes.

Suzy: Okay. One of the problems that I had, as I was grappling with this, was how to reflect the changes in people and in literacy programs in a factual, measurable report, remembering that I was aiming all along at that end product.

Michael: And the form of the report did drive the shape of your research?

Suzy: I don't think I was aware of that at the time. I did a pilot of three people: a learner, a parent and a tutor, a comfortable interview with each one, just chatting. When I finished, I looked at the results and listened to the tapes and I thought: "How, if I have 21 people, am I going to make generalizations so that I could report some findings?"

"I looked at the results and listened to the tapes and I thought: 'How, if I have 21 people, am I going to make generalizations so that I could report some findings?'"

Michael: I hear a lot of assumptions in what you're saying. You talked about a mindset (for quantitative research) and you talked about your need to do something measurable for funding and yet, in the same context, you talked about the need to describe changes in people's beliefs about themselves and about their learning processes. I'm sensing a dilemma; on the one hand, there is a need to produce measurable results in terms of learning and, on the other hand, a need to discuss/describe people's perceptions of the learning process and how they have changed as a result of being involved in the program. Why do you feel the need to generalize people's feelings?

Suzy: Because I felt I needed to make a report and I had to say something in the report. Was I going to say 21 different things? Remember, this is not a group situation, this is one-to-one which makes it even harder to find any generalization. But I felt I needed that. What do funders want? Maybe we have to find out from them.

Michael: Maybe we're talking about educating funders in understanding the kind of information that would be useful for them. If funders are talking about numbers -- people coming into programs, leaving programs, getting jobs...

Suzy: And how many hours and how many books...

Michael: That talks to the things that people do but not necessarily to the things that people learn.

Suzy: Okay, I was going to bring that up about learning. I am of the school, Michael, that thinks that learning must include some skills as well as some confidence, esteem, as well as personal feelings. I think you have to have some skills in there too.

Michael: Absolutely.

Suzy: And I guess I'm feeling that skills can be measured.

Michael: Skills can be measured but can skills be measured in isolation to how one feels about the way in which skills were learned? Can you separate the product from the process? I think you're right in saying that funders have found themselves in a rut; they've found themselves trapped in this belief that it's the product that measures people's learning.

Suzy: Do you know, I'm not sure that funders have. I feel, in the past, we've been very lucky with our funders who have given us a lot of scope and not made us provide measurable quantities of learning. This is going to change. I think that the people out in the programs, the community-based programs, are feeling that measurement is going to come and they're going to have to learn (how to measure). One of the things they look at, in evaluating their programs, is what has been learned -- this is what I came up against.

Michael: What you're saying, though, is that there has to be a reasonable balance, a blend between measuring skills and "measuring" beliefs.

Suzy: The intangibles.

Michael: Yes.

Suzy: Help me. How do I measure the intangibles? What do I do with the data I have?

"How do I measure the intangibles? What do I do with the data I have?"

Michael: I'm questioning the assumption, first, that everything has to be measurable. When we get into the question of measuring, we're often discussing the issue of generalization whereas what we need to do, as well as measure, is also to describe. We can't be measuring everything and I'm not sure it's appropriate to always be measuring. There is a value sometimes to also be describing, describing how people feel, describing how people have changed their understandings of their own learning processes and describing how people have gone through a learning journey. I think that comes from looking at the interview data, at the language that people use and going through that language, picking out patterns of thought. So you go through all the learners' transcripts - this takes a lot of time - and you isolate each comment. As you're going through the comments, you can put them into groups. Where you see they're talking about the same things, you physically put them into those groups, either cut-and- paste or using a computer program. And then you see what they're saying and you pull the patterns from that. You can talk about those patterns and describe them and what they say about the learning processes that the learners have gone through. You can talk about the patterns in terms of what the parents have to say and the same process with the tutors. You can compare patterns; you can compare descriptions.

Suzy: Let's try to get this down to concrete terms. One of the patterns that I found with the people I interviewed was their pleasure with the one-to-one interaction. But you also have to look at the fact that was the program they were in. There's no comparison here.

Michael: No, but you may want to compare how the learner feels about the one-on-one contact with that of the tutor...

Suzy: ...and the parent. I did that but I was trying to measure too. In the perception of learning I found out that the students and their parents felt that the learners had learned more than the tutors thought they had. But this was a measurement.

Michael: Yes, and that's quantifying perception.

Suzy: Yes, but I wasn't able to test. That was their perception of how much they had learned.

Michael: What I see as a difficulty with that, Suzy, is the fact that you miss all of the rich data that says why.

Suzy: That's back at the quotes.

Michael: That's right. That talks about why learners and parents feel the learners had learned more. It's those "whys" that really give you an understanding of the processes that are occurring. They give you an understanding of the mechanisms going on in that one-on-one interaction that helps the learners understand that they're learning more than the tutors believe they are. Does that make sense to you?

Suzy: It makes sense but in a way I think that we've been playing around with semantics here because aren't I making a generalization?

Michael: No you're not. You're talking about this group of learners and you're providing evidence. For example, if the learners give you reasons why they feel they learn more and they're saying such things as, "I was able to ask questions. I felt comfortable asking questions", that's rich data. That's rich information for trying to understand.

Suzy: But is it wrong to try to quantify some of these things too?

Michael: No, it's not. And quantifiable data has a very important role too.

Suzy: I think that in my research I tried to do both. Well, no. I was really trying to quantify but I got the quality data too because the tape recorder was on, and because they could say anything they wanted to. But it gets us back, Michael, to what we were originally trying to do in this dialogue - what my perception of evaluation was - that I had to have hard facts and I think a lot of people feel that an evaluation has to be hard facts. And this was the dilemma that I was in.

Michael: What is more "hard" than somebody providing a reason for their perception of learning? If I take a hundred people and I ask them how much they believe they've learned, it's still perceptual data. And if I quantify that, I put that into numbers and I found out that, of the hundred people, fifty of them felt that they had learned this much and fifty of them learned that much, what does that tell me? Now, if I supplement that by asking them, "Why do you think you learned that?" and the responses talk about the atmosphere of the learning situation, they talk about the quality of the interaction between themselves and the tutor, that is really hard information. That's very rich.

Suzy: That's an interesting thing to remember.

Michael: And I think for funders that information would be very important. Because it may point to a need for professional development for tutors that the funders would be willing to support, if they realized the need for it. I think we have one more step to go, Suzy, and that is the process that you go through in pulling out this.

Suzy: It was after my pilot when I went back to develop a questionnaire that was going to be the same for everyone - obviously hoping to give them great freedom in the interview - but I wanted those 20 questions answered. Should I look for the quantitative stuff in the questionnaire and then at the end, after I have the interviews, pull the quality out of it?

Michael: Yes. Then if you're asking your interviewees to make certain choices in the questions, that's your quantitative data. In your interviews, you have a protocol that identifies a number of key questions. You pose a question and then, when the response comes back to you, you use the response to pose two or three other questions.

"Should I look for the quantitative stuff in the questionnaire and then at the end, after I have the interviews, pull the quality out of it?"

Suzy: To get?

Michael: To get the richness out of the responses. When you've exhausted that, then you go to the next standard question.

Suzy: Writing a questionnaire is difficult.

Michael: Yes, it is. But it's not impossible when you focus on the kind of information you want to receive. Not, what is the information I want to get - that structures your whole focus. If you say "What kind of information do I want to get? Do I want to get at an understanding of people's reasons for behaving?", then I structure four or five key questions and then feel free, feel comfortable in going off on tangents, depending on what the learner answers.

Suzy: Letting the richness come after the questions.

Michael: That's right. And when that question and all of the related subquestions that arise spontaneously have been exhausted, then you go to the next question. You may have five standard questions that you have created and you may ask twenty-five questions in the whole interview. And then you go through the data, through the interview transcripts and you read each one. As you're reading, you put the comments and ideas into categories that you have created. But you are not quantifying them. When you put them into categories, you're doing that so that you can understand the patterns that emerge from them. You may have five statements from each person talking about the reasons why the environment is so important. You put all those comments together and draw patterns from them. What is this group of people saying about the environment? What are the important features of the environment that they have found that help them to learn? That's the kind of data and understanding that you pull from qualitative research data.

"We're grouping and then analyzing that group in order to more clearly understand what our respondents are saying to us."

Suzy: When we categorize, are we not quantifying?

Michael: No, that's not quantifying, because we aren't counting. We're grouping and then analyzing that group in order to more clearly understand what our respondents are saying to us.

Suzy: I think I did some of that. It's just... well a lot of my ideas changed as I went through this.

Michael: Talk to me a bit about the changes that you experienced as you went through this process, Suzy.

Suzy: I found it much more difficult than I thought. Over the years, my perceptions have been heightened. In fact, my article has a quote from a questionnaire I sent out a few years ago and I am embarrassed when I think of the information I got from it and the fact that I didn't do much with it. I think what I really wanted was a pat on my back, to find out that I was doing all right with the program...

Michael: That's important.

Suzy: ...a validation that the learners felt they were learning something. But certainly, in this, I wanted to get a great deal deeper into how people were thinking. But I'll repeat what I started out with in this discussion - that the whole thing was aimed for the final result. The product was like a yoke around my neck and I still, having gone through it and realized how much more I could get out of a moderately simple questionnaire, I still think that report at the end has to be kept in mind. I don't believe that I have changed at all in that; that it's driving the whole process.

Michael: And that's as it should be. If you know what the final product is, then that drives everything else about the research.

Suzy: But you're going to have to be careful with that to keep your expectations out of it. I knew I wanted it to be highly complimentary to the program because the reason we were doing it was to get more funding.

Michael: That's right. Immediately that biases the report and that skews the findings.

Suzy: Possibly, yes. But if you state the fact at the beginning that the purpose of doing this evaluation was to go to funders to get more funding... does that straighten your conscience out about your bias?

Michael: That's really important: Does confessing to the crime before you do it absolve you of the crime?

Suzy: I have not had anything to do with a literacy program where the vast majority of the participants were not happy with it because, by the nature of it, the learners are a group of people who have been disadvantaged in learning. Anything they're getting they're happy about. But I think, Michael, sometime we have to be able to measure that happiness to find out if we can't do better.

Michael: I understand what you're saying and I'm wondering if you're confusing measurement with identification. A lot of my learning does not come from measuring things. It comes from understanding the mechanisms that are occurring, understanding the processes that are happening. If I want to measure happiness, what measures am I going to use? Am I going to measure the degree of satisfaction? Am I going to count all of the good feelings that people have and sum them up?

Suzy: And everyone's going to feel that their feelings are different anyway.

Michael: That's right. But if I try and uncover and unpack the reasons why people feel happy, isn't that going to help me understand how I can make the environment even more happy? And that is the real purpose that I see of qualitative data analysis and qualitative findings for evaluation, because they help to explain "why". And maybe that's designed for the people who run the programs rather than the people who fund the programs.

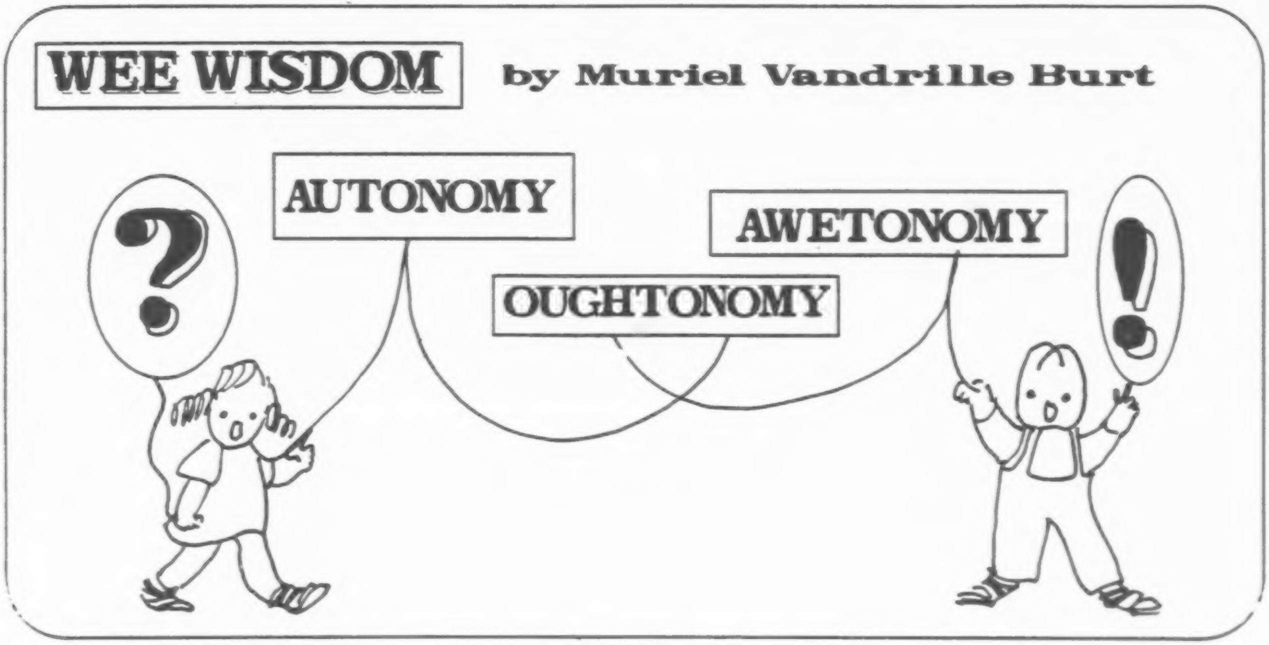
"Maybe we have to give them their quantitative data. ... But maybe also, in the process, we can help to educate them to ask ... those questions that get to understanding what's happening in the process."

Suzy: All right, but what do we give the people who fund? I mean, our evaluations have to produce something.

Michael: Well maybe we have to give them both, Suzy. Maybe we have to give them their counts; maybe we have to give them their quantitative data. I mean that's what they use to measure success: accountability for the dollars spent. But maybe also, in the process, we can help to educate them to ask the right questions too. Or ask those questions that get to understanding what's happening in the process.

Suzy: What's happening to the people involved.

Michael: But that raises another interesting dilemma too, because the more information we give funders about what's happening in the program, the more vulnerable we become as program deliverers.



Suzy: What do you mean?

Michael: Well, if funders begin to understand the processes that produce good learning, and those that impede good learning, then maybe they're going to demand much greater accountability in terms of building good programs and well-run programs and be less tolerant of programs that aren't as well-run.

Suzy: But, Michael, that means we're going to have to take a whole bunch of generalizations out of this. What works for my program is going to work for your program? You can't do that. One of the wonderful, great things about the way the literacy field in Ontario has gone is the tremendous acceptance that the Branch has had for diversity. I think that most of the people that I know and talk to are scared stiff that we may ever lose that.

Michael: But that fear doesn't need to stop us from collecting that rich qualitative data that will help program deliverers; that will help practitioners understand what's happening in the learning process and how to build an even stronger, more powerful learning process.

Suzy: You know, the evaluation or whatever name we want to give to it, is going on all the time. The chatting at coffee, everything that's going on in the classroom, the talk on the stairways as they leave and put on their coats, it's all qualitative research, all the time. One of the big difficulties within the one-to-one situation is passing on that information, sharing it with other tutors and students.

Our dialogue ended here. We enjoyed our discussion and hope that you gain something from it. Please contact either or both of us to share your views o program evaluation.

REVIEWS AND NEWS

RESEARCH REPORT

LITERACY IN SOUTH MUSKOKA

Prepared for the Literacy Society of South Muskoka, Inc.
Funded by Employment and Immigration Canada, Canadian Jobs Strategy
Researched and Written by Joanne Malchuk
Project Consultant Charles Craig

Reviewed by Anne O'Neill

Literacy in South Muskoka is an excellent addition to the growing collection of research being conducted, written and published on the subject of literacy in Ontario. As such, it deserves a better fate than to be relegated to the shelves as another document just gathering dust. Although South Muskoka may initially sound like a place far-removed from the day-to-day affairs of literacy practitioners, advocates and researchers in other parts of the province, Joanne Malchuk's report portrays a community struggling to identify and to resolve many of the same issues that affect all of us in our common environment. It is well worth taking time to review this report to discover how your landscape may be similar to, and at the same time, different than the one she describes.

Literacy in South Muskoka represents a unique perspective on literacy because as a qualitative type of research it "reflects the face of literacy" as opposed to focusing solely on statistics. The report is divided into four parts, each of which contains helpful information: an introduction, background information, barriers to literacy and recommendations for future development. These are preceded by a short preface and followed by statistical tables which utilize numbers, percentages and levels of literacy recently provided by federal and provincial researchers. By combining their research with her own, Malchuk provides a common point of reference which any reader can use to identify important connections and contrasts between the 'face of literacy' in the region of South Muskoka and its face within our own communities.

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The introduction describes the intention, the funding mechanism and the process this researcher utilized on behalf of the Literacy Society which resulted in this "blueprint for the future". It includes a clear account of the methods of research she used as well as interview guidelines for both the content and the subjects involved in the research. There is also a brief and informative explanation and analysis of levels of literacy and statistical tables which identify reading skills' levels as they relate to age, region and gender across Canada. For anyone who is presently engaged in the research process, or for those considering research in this field in the future, this compilation of information will save both time and energy.

Section II, "Background Information" provides an entertaining verbal map of the geography and demography of South Muskoka which gives the reader a feeling for the community. For example I was delighted to read about things like Gravenhurst's "historic opera house". This section identifies income and education levels and the links between them. It introduces us to the history and present appearance of the "Literacy Society of South Muskoka, Inc." and describes the area's struggle to bridge the gaps between awareness and connection, knowledge and action. Its greatest value is that the paradigm used provides a model against which our own communities' literacy issues can be better understood and appreciated.

Section III focuses on barriers to literacy which exist in the rural and economic reality of South Muskoka. I was reminded as I read that many people I know are affected by the same barriers and these people live in a city. The attitudes and various points of view expressed by individuals who participated in Malchuk's study are remarkably similar to attitudes and perspectives of people I know. Information about learning opportunities, culture and the stigma of illiteracy is graphically illustrated throughout the report and I was reminded again and again of the profound need for every one of us to be able to speak as subjects describing our own experiences and identifying our own choices and values. This approach discourages stereotypical and judgemental descriptions of other peoples' "problem". Reading this report personalized the 'face of literacy' both in Muskoka and in London.

"... I was reminded again and again of the profound need for every one of us to be able to speak as subjects describing our own experiences and identifying our own choices and values."

The final section is entitled "Recommendations" and it focuses on five areas: service, advocacy, coordination and facilitation in the community and funding. These thirty pages are a goldmine of strategies which could be utilized by an established community literacy group or by an individual. Many of the recommendations are practical and inexpensive, and some are familiar. Consider reading the document to identify those things you are already doing ... or not doing. If your community lacks a literacy society, this document provides a blueprint for obtaining funding, establishing a group and maintaining it in your area. Joanne Malchuk also concentrated on her vision of the future role of the Literacy Society in South Muskoka and she concludes: "There may be many far-reaching uses for these results ... This work has its roots in the Muskoka cottage country, but it may have a relevance for many other rural literacy groups." The only change I would make to her conclusion is that it has relevance to urban literacy groups, practitioners and researchers as well.

In an attempt to determine what the impact of this document has been since its publication in 1991, I spoke with Charles Craig. To his knowledge, the report has not been broadly circulated in Ontario. I also contacted the Muskoka Literacy Council in Huntsville who are neighbours of the South Muskoka group. A member there reported that since 1991, the two groups have shared responsibility for one ESL program and some radio advertisement costs and she described the presence of a reading tent at the fall fair in Huntsville, organized by the South Muskoka Literacy Council. Some of these activities have resulted from this work. Hopefully there have been many other results. As a microcosm of the issues which face many of us living beyond the fringes of the cottage country, Joanne Malchuk's research highlights "the face of literacy" in an engaging and interesting manner. It illuminates the complexity of the factors which affect the literacy of all communities. For these reasons, taking the time to read Literacy in South Muskoka will be time well spent.

Literacy in South Muskoka is available from the
Literacy Society of South Muskoka
151-1 Royal St.
Gravenhurst, Ontario
P1P 1H5
(705) 687-9323.

It is also available on loan from **Alpha Ontario**. You can contact them by calling 1-800-363-0007.

REVIEWS AND NEWS

SUMMARY REPORT

RECOGNITION FOR LEARNING

Did you ever want a real live example of community action research?

Here's one from rural Ontario!

The Recognition for Learning Pilot Project used participatory methods involving many literacy groups, learners, tutors, coordinators to imagine, design and test a model. The model has developed a learner-centred way to give certificates to recognize literacy learning.

The Summary Report of Results and Recommendations is now available from Andrea Leis, Conestoga College, Box 848, Stratford, Ontario N5A 6W3 for $10.00.

The report describes the research process in detail and includes examples of materials used.

DO YOU HAVE YOUR COPY?

SEEK, GATHER AND PROCESS

A RESEARCH MANUAL FOR LITERACY PROGRAMS

Contact Donna Miniely, Coordinator
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